State of Maine

IT Staff Augmentation Services Contract

Hiring Manager Training Guide

CAI / Maine Confidential

Table of Contents

LOGIN INFORMATION

This training guide details the Peopleclick tool and how it's used to procure and manage IT resources under the Maine IT Staff Augmentation contract. It covers various stages of the requisitioning process, including:

- Tool navigation
- Requirement creation and approval
- Candidate review and selection
- Timesheet approval
- Engagement evaluation

Please feel free to use this page to record your personalized login information.

Peopleclick Login Information

URL: https://vms.peopleclick.com

User Name: ____

Password: ____

Org ID: i3820

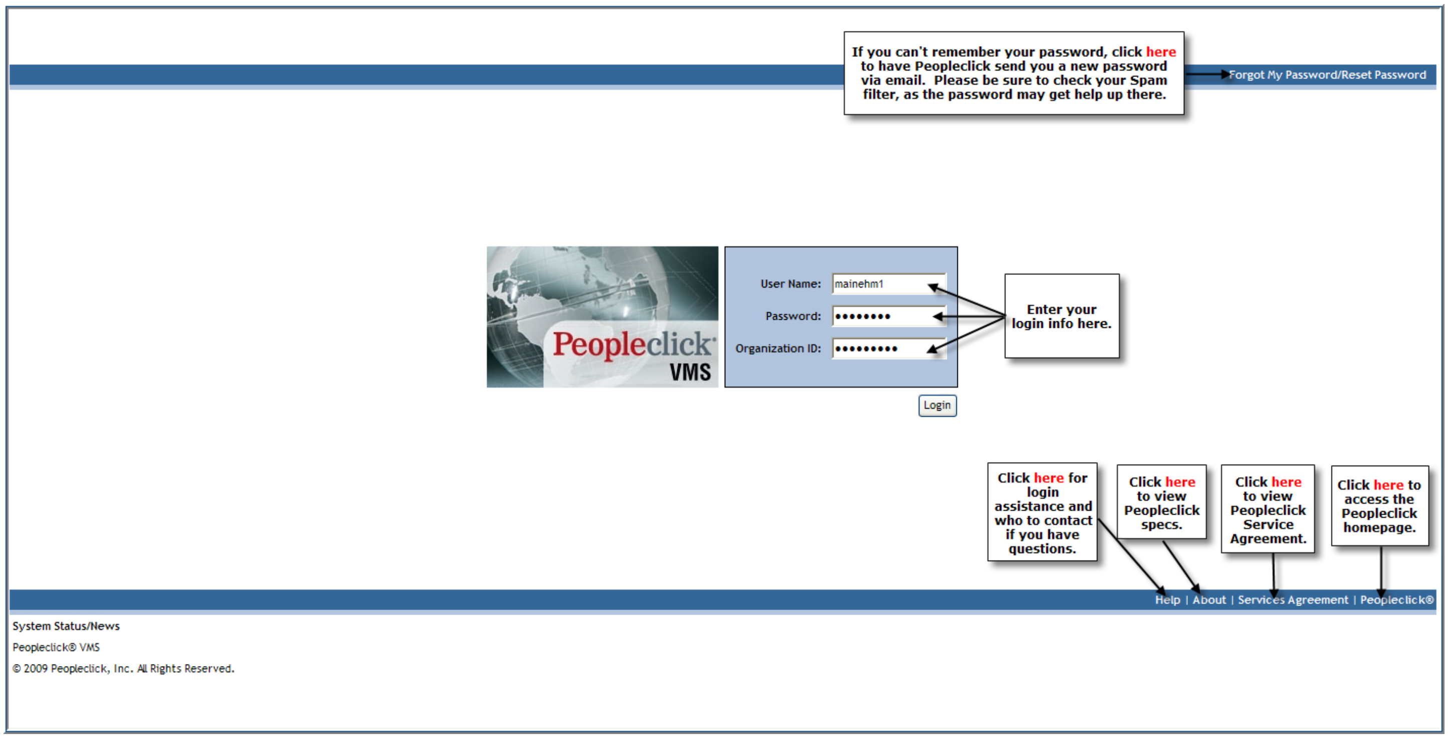
NAVIGATING THROUGH THE TOOL

This section provides you with a high-level overview of Peopleclick.

Login

- Open internet browser
- Enter appropriate URL
- Enter Login Information

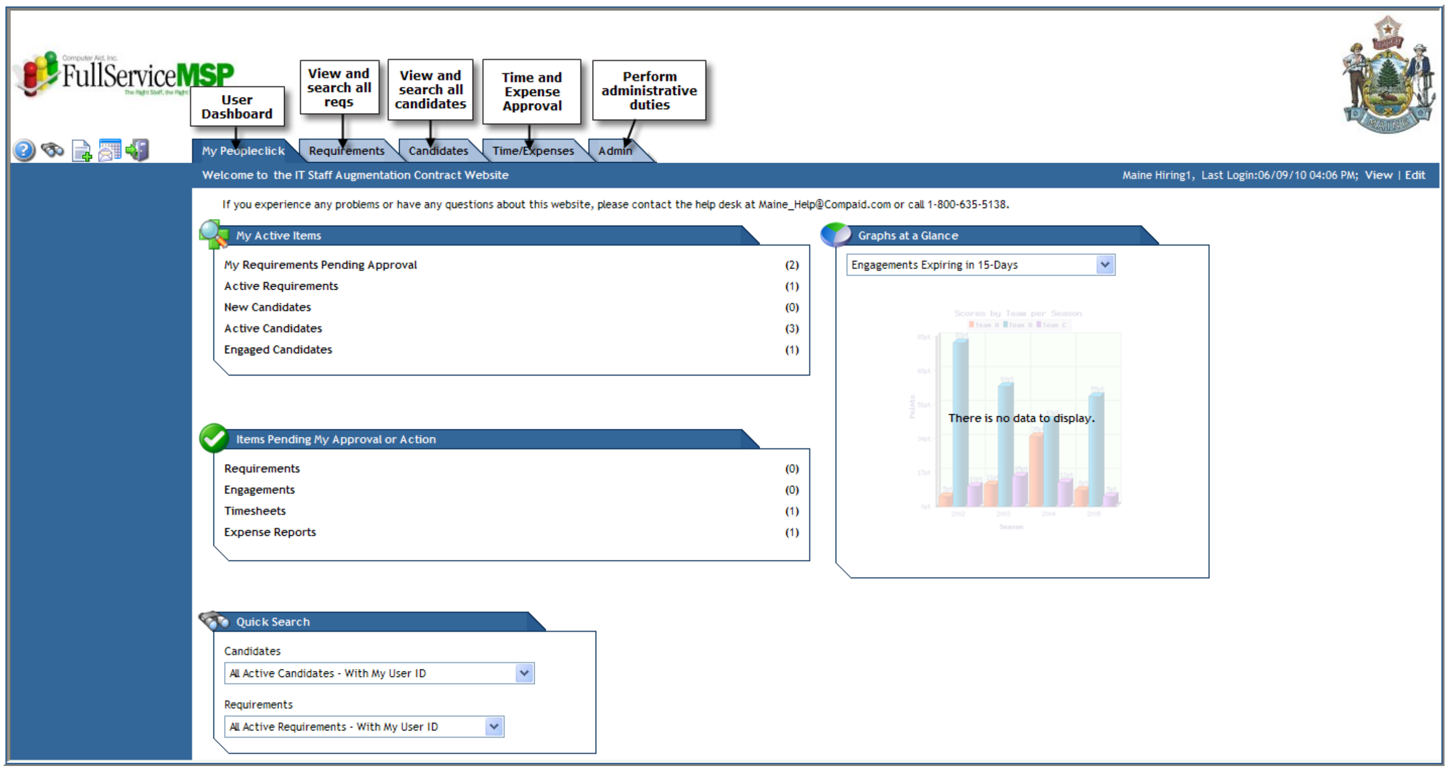
Please note: When you enter the site for the first time, you will need to sign-off on a Software Service Agreement. After your initial log-in, you will not need to do this again.



View Application Tabs

The following image points out the five tabs that allow you to navigate through the site. These five tabs are as follows:

- My Peopleclick
- Requirements
- Candidates
- Time/Expenses
- Admin

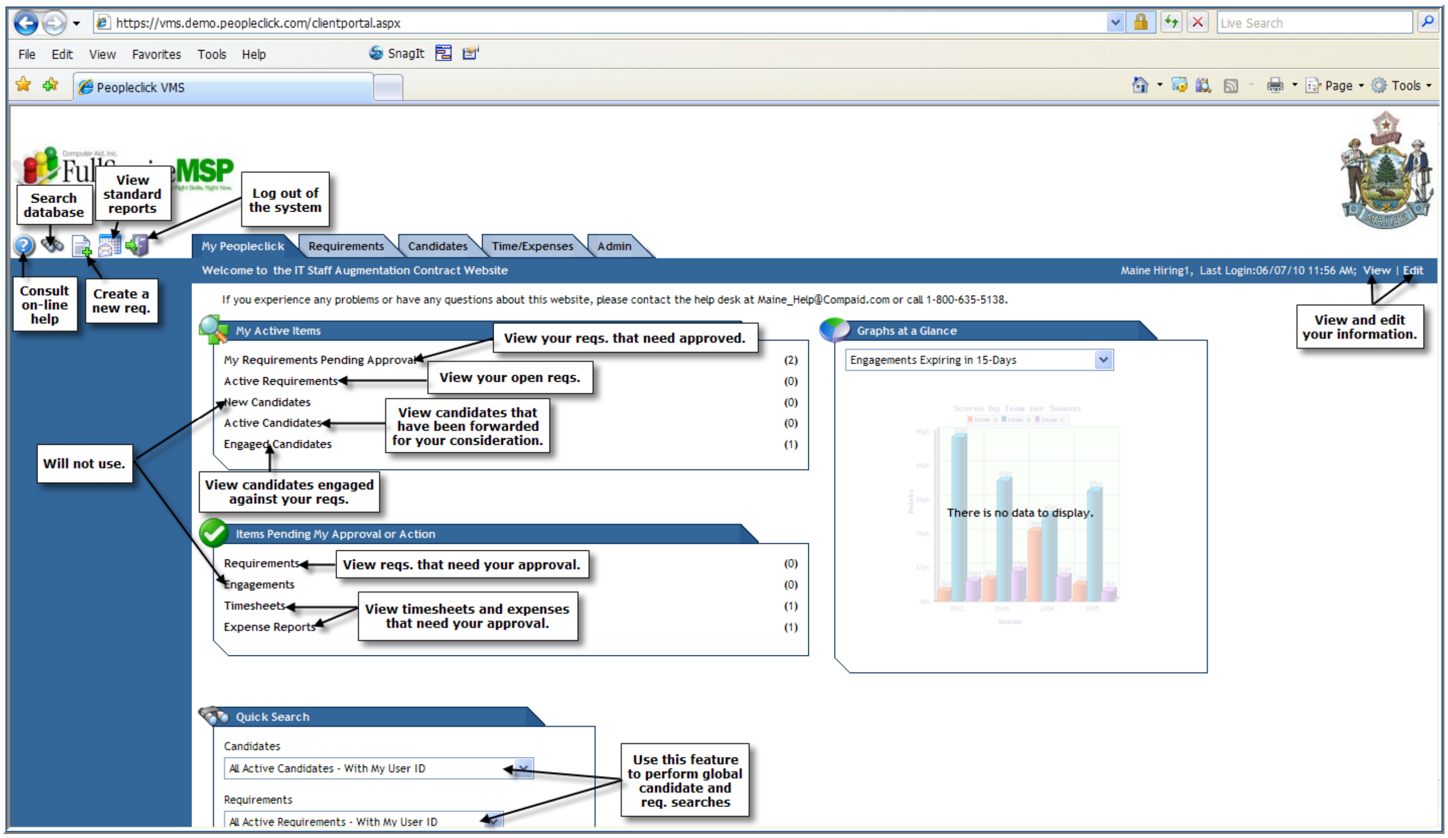


The following pages detail each tab.

My Peopleclick Tab

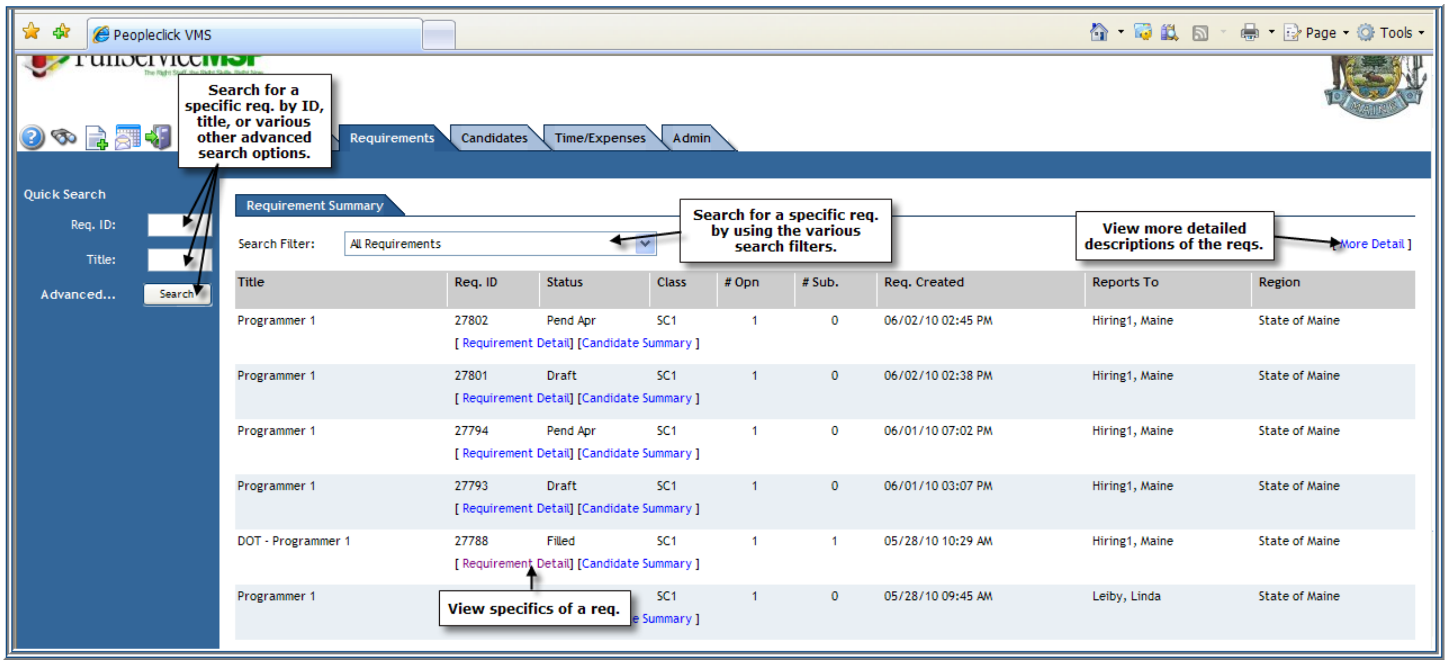
This tab enables you to perform the following tasks:

- View or edit your user information
- Enter a new requirement
- Access your active items
- Access items pending your approval
- List candidates or requirements that meet the criteria you select via global searches
- Request Reports



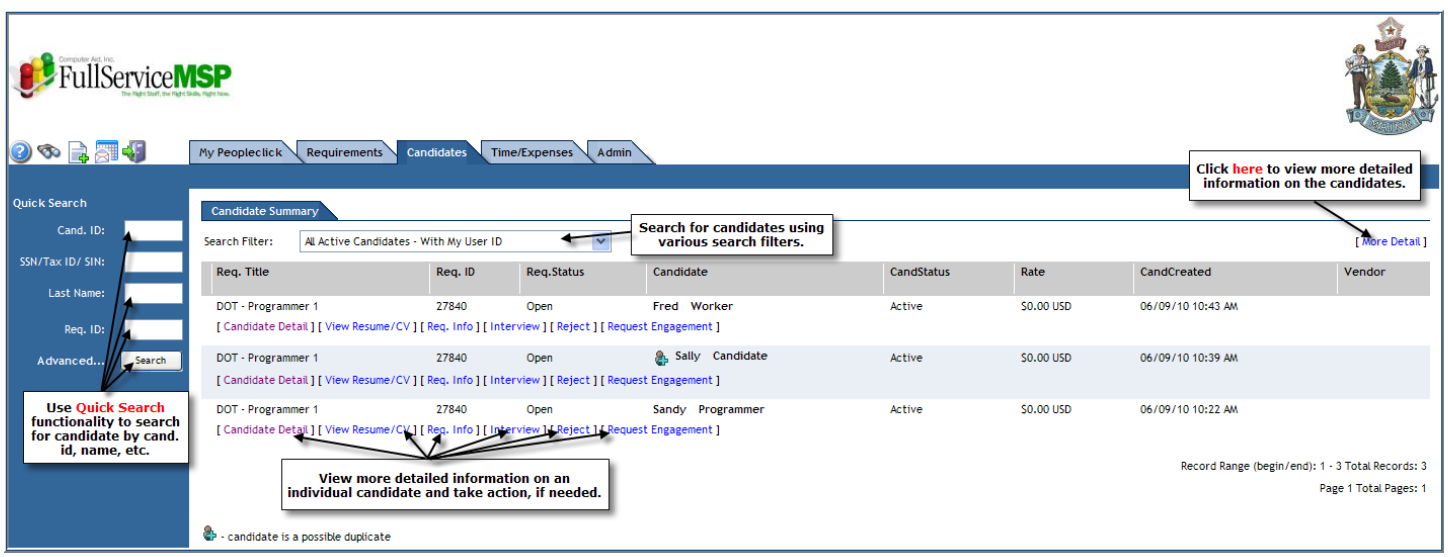
Requirements Tab

This tab displays the list of open requirements that you have created. You can search for requirements by using the **Search** feature and then select a specific requirement.



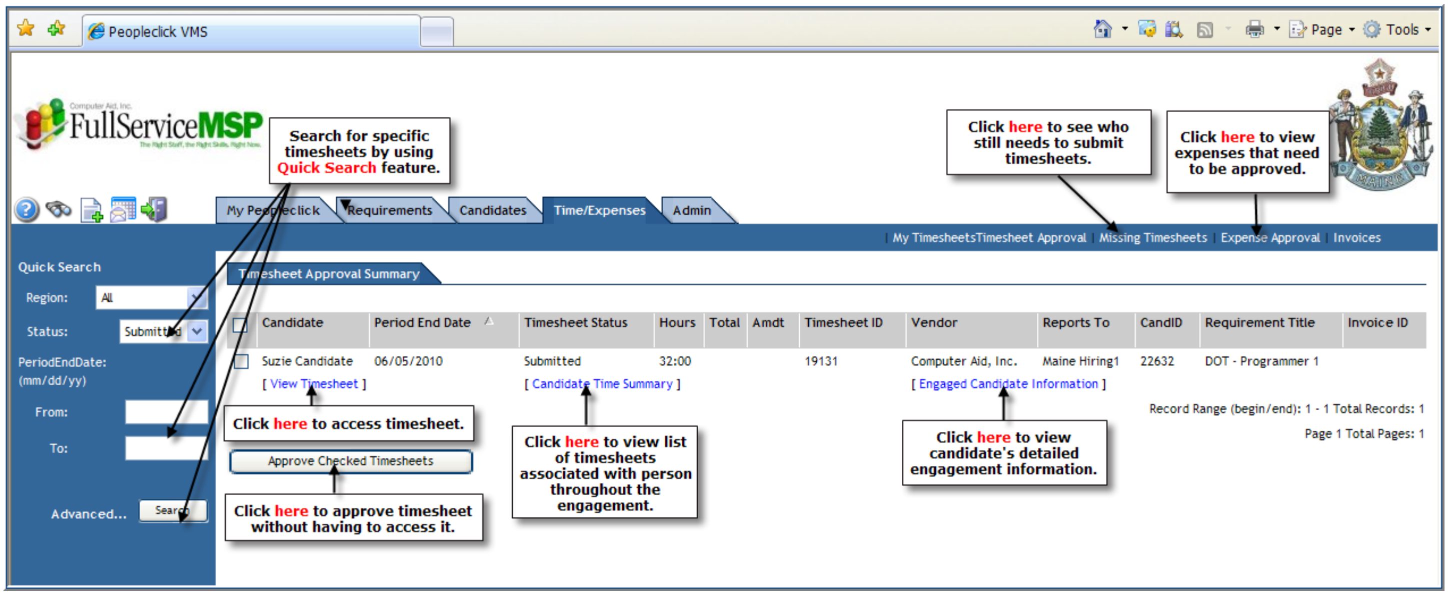
Candidates Tab

This tab displays a list of candidates who have been screened by your CAI Account Manager and have been submitted against your requirements. You can search for candidates by using the **Search** features and then select a specific candidate.



Time/Expenses Tab

This tab displays a list of engaged candidates' timesheets or expenses for which you have approval authority as well as a list of your engaged candidates who have not entered weekly timesheets for their engagement. You may approve timesheets without seeing the timesheet, or you can access the actual timesheet to get specifics of submitted time.



Admin Tab

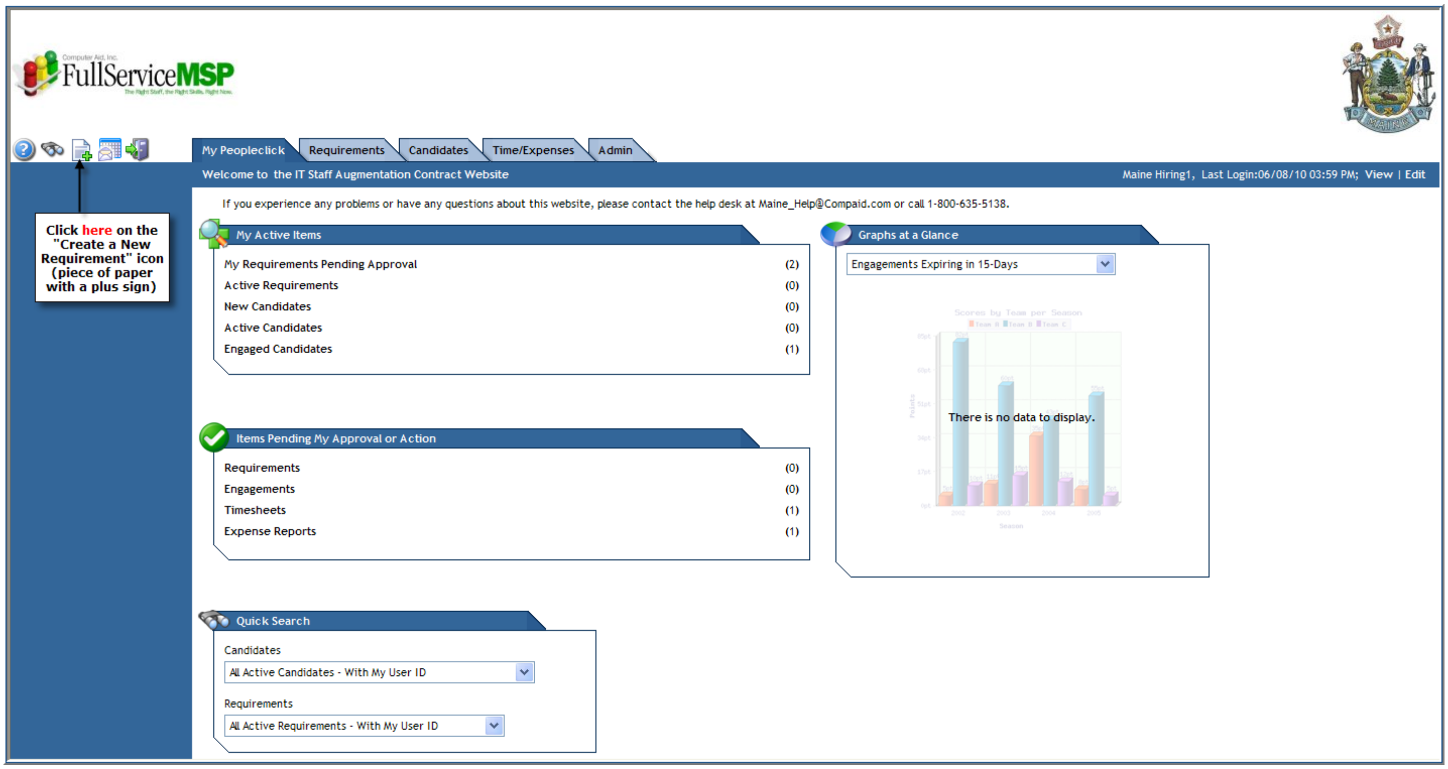
This tab displays your organization's information. The information is viewable by all; however it can only be edited by those with Admin authority.

REQUIREMENT ENTRY PROCESS

The Maine IT Staff Augmentation Services contract brings a uniformed ordering process to all agencies through the Managed Service Provider, Computer Aid, Inc. The following pages detail the workflow Hiring Managers must follow in order to fulfill a requirement under this contract.

Initiate a New Requirement

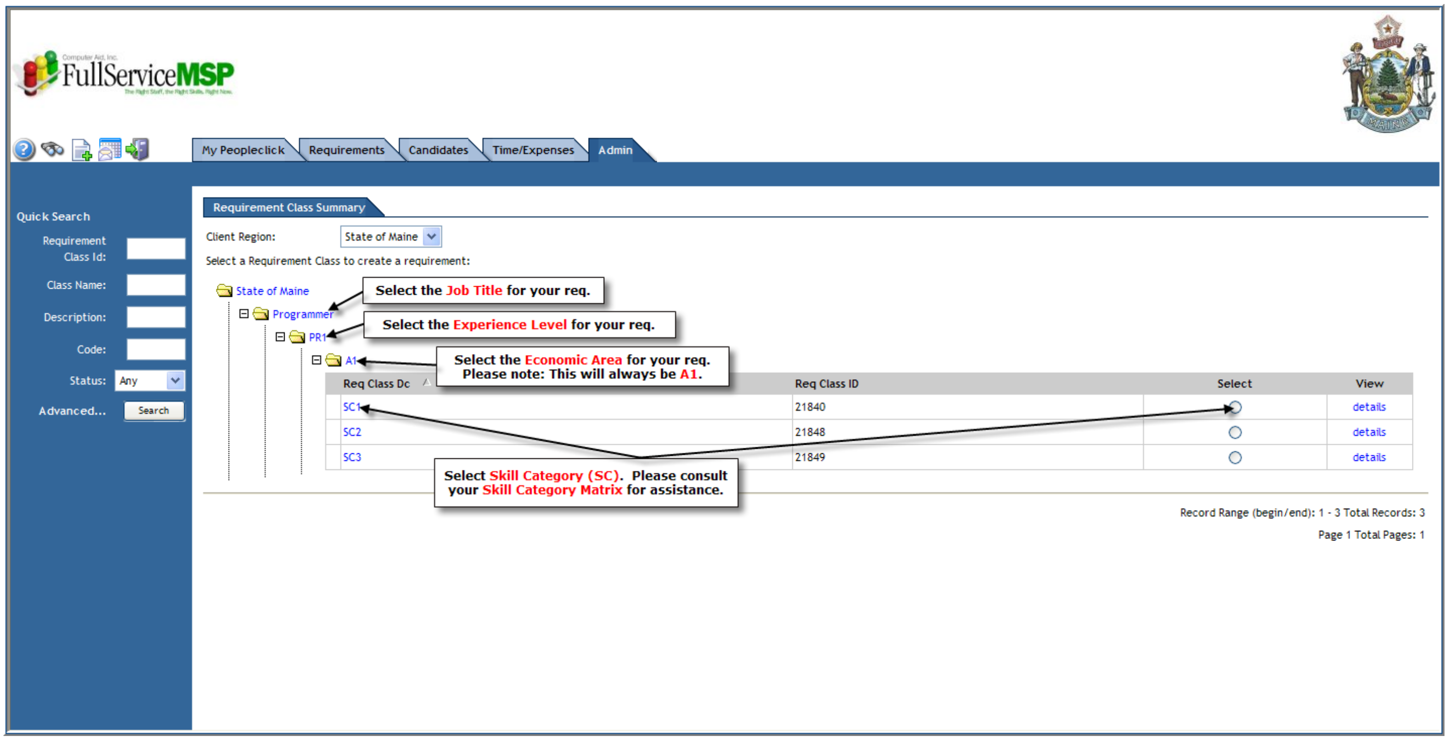
After discussing the need with the CAI Account Manager and all appropriate internal users, you will need to enter your requirement into Peopleclick. **Please note:** Before entering the requirement, you will need the delivery order number generated through AdvantageME.



Select Requirement Class

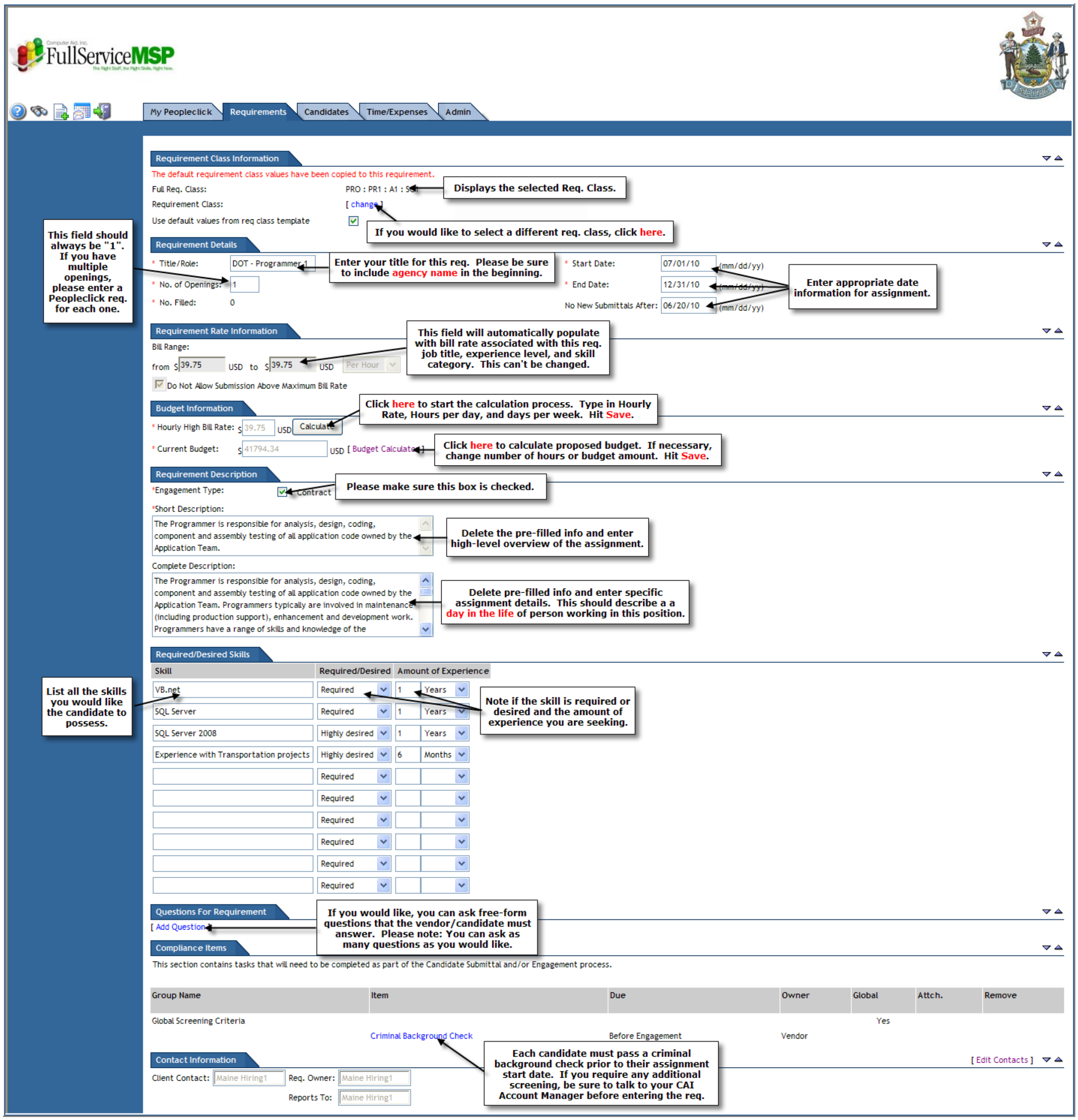
There are four levels to a requirement class that must be selected when creating your requirement. **Please note:** These levels help to determine the rate.

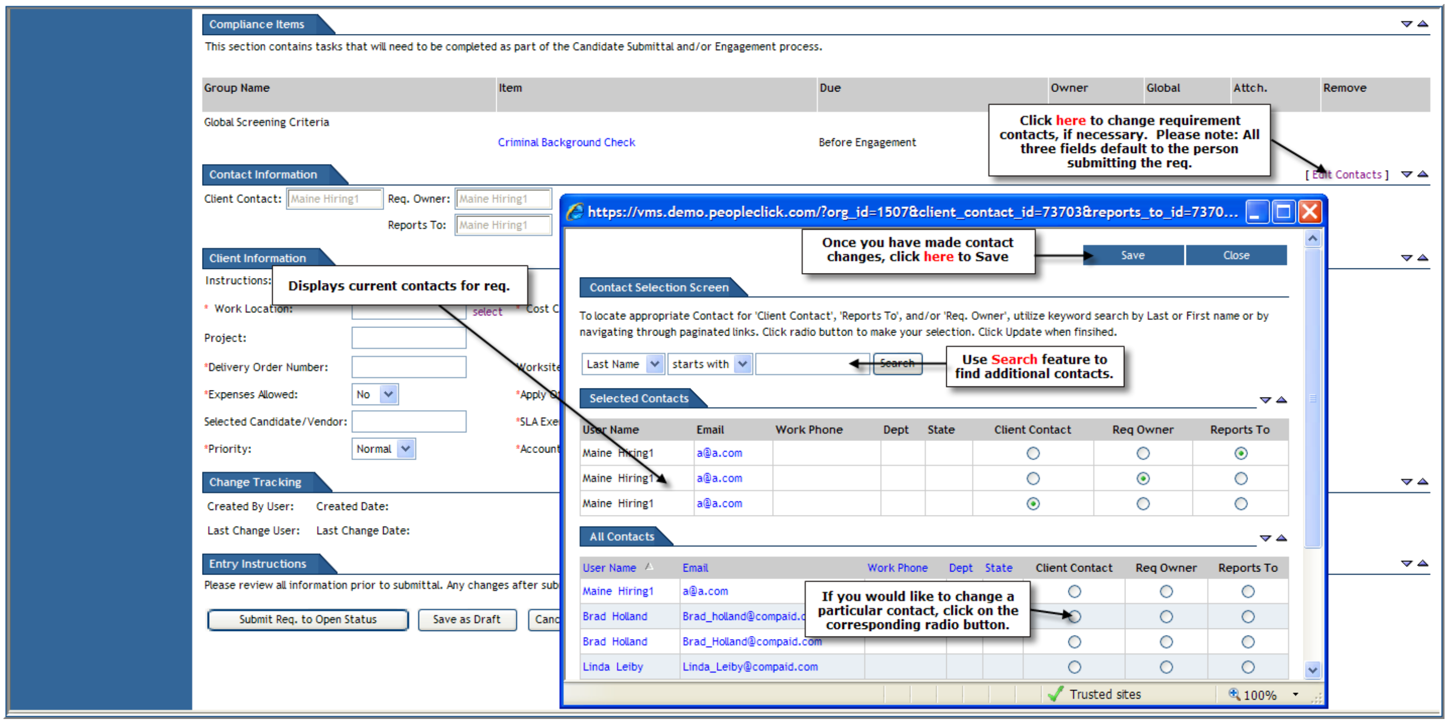
- Job Title
- Experience Level
- Economic Area
- Skill Category

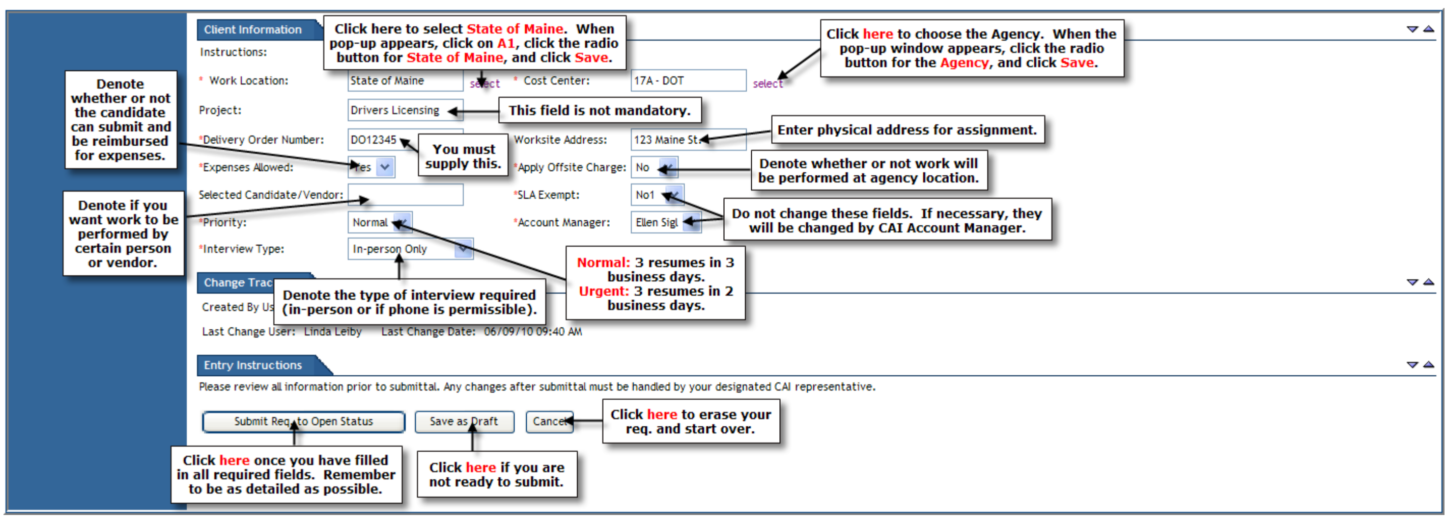


Enter Requirement Details

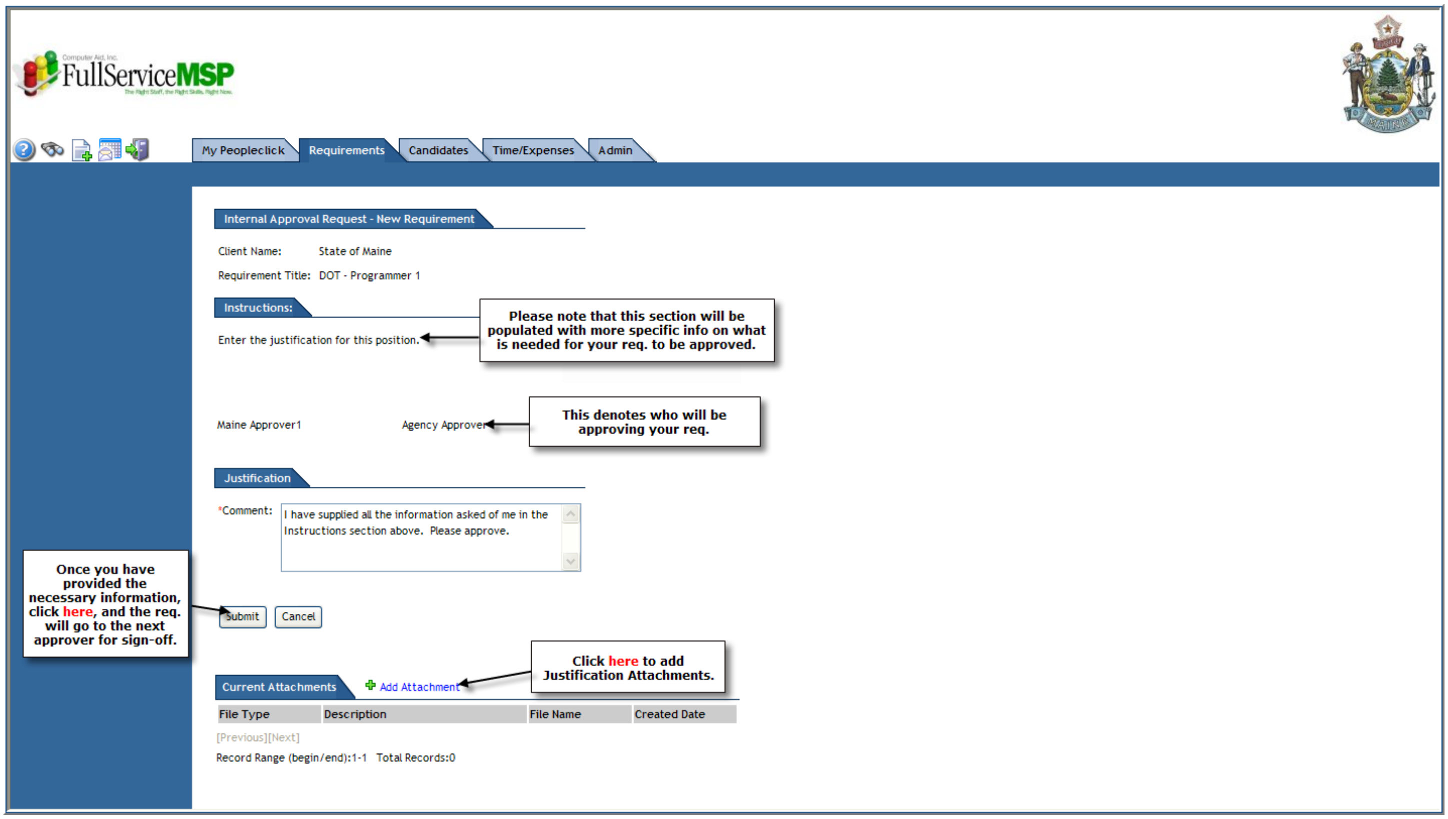
After you select the requirement class, the **Requirement Detail** page appears. Some information is pre-populated depending on the template for each Requirement Class.




Compliance Items
This section contains tasks that will need to be completed as part of the Candidate Submittal and/or Engagement process.
Group Name
Item
Due
Owner
Global
Attch.
Remove
Global Screening Criteria
Criminal Background Check
Before Engagement
Click here to change requirement contacts, if necessary. Please note: All three fields default to the person submitting the req.
[Edit Contacts]
Contact Information
Client Contact: Maine Hiring1
Req. Owner: Maine Hiring1
Reports To: Maine Hiring1
Client Information
Displays current contacts for req.
Once you have made contact changes, click here to Save
Save
Close
Contact Selection Screen
To locate appropriate Contact for 'Client Contact', 'Reports To', and/or 'Req. Owner', utilize keyword search by Last or First name or by navigating through paginated links. Click radio button to make your selection. Click Update when finsihed.
Last Name
starts with
Search
Use Search feature to find additional contacts.
Selected Contacts
User Name
Email
Work Phone
Dept
State
Client Contact
Req Owner
Reports To
Maine Hiring1
a@a.com
All Contacts
Brad Holland
Brad_holland@compaid.com
Brad_Holland@compaid.com
Linda Leiby
Linda_Leiby@compaid.com
If you would like to change a particular contact, click on the corresponding radio button.
Change Tracking
Created By User:
Created Date:
Last Change User:
Last Change Date:
Entry Instructions
Submit Req. to Open Status
Save as Draft
Trusted sites
100%


Client Information
Instructions:
Click here to select State of Maine. When pop-up appears, click on A1, click the radio button for State of Maine, and click Save.
Click here to choose the Agency. When the pop-up window appears, click the radio button for the Agency, and click Save.
Denote whether or not the candidate can submit and be reimbursed for expenses.
Work Location:
State of Maine
select
Cost Center:
17A - DOT
Project:
Drivers Licensing
This field is not mandatory.
Delivery Order Number:
DO12345
You must supply this.
Worksite Address:
123 Maine St
Enter physical address for assignment.
Expenses Allowed:
Yes
Apply Offsite Charge:
No
Denote whether or not work will be performed at agency location.
Selected Candidate/Vendor:
SLA Exempt:
No1
Denote if you want work to be performed by certain person or vendor.
Priority:
Normal
Account Manager:
Ellen Sigl
Do not change these fields. If necessary, they will be changed by CAI Account Manager.
Interview Type:
In-person Only
Normal: 3 resumes in 3 business days.
Urgent: 3 resumes in 2 business days.
Change Tracking
Denote the type of interview required (in-person or if phone is permissible).
Last Change User: Linda Leiby
Last Change Date: 06/09/10 09:40 AM
Entry Instructions
Please review all information prior to submittal. Any changes after submittal must be handled by your designated CAI representative.
Submit Req. to Open Status
Save as Draft
Cancel
Click here to erase your req. and start over.
Click here once you have filled in all required fields. Remember to be as detailed as possible.
Click here if you are not ready to submit.

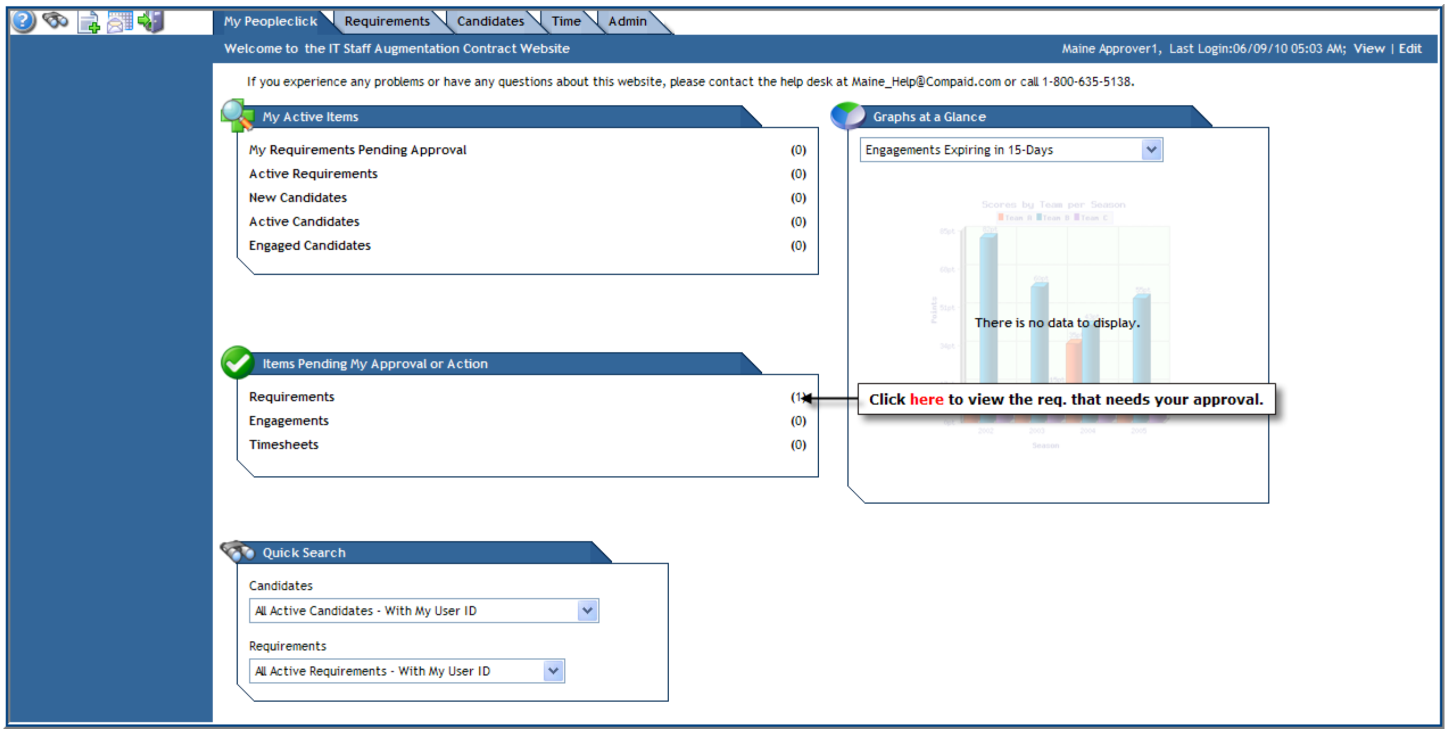
Once you submit the requirement to open status, the **Approval Request** page must be completed next. Once you have entered the necessary justification for entering this requirement and click the Submit button, the requirement will go to the approver for sign-off.

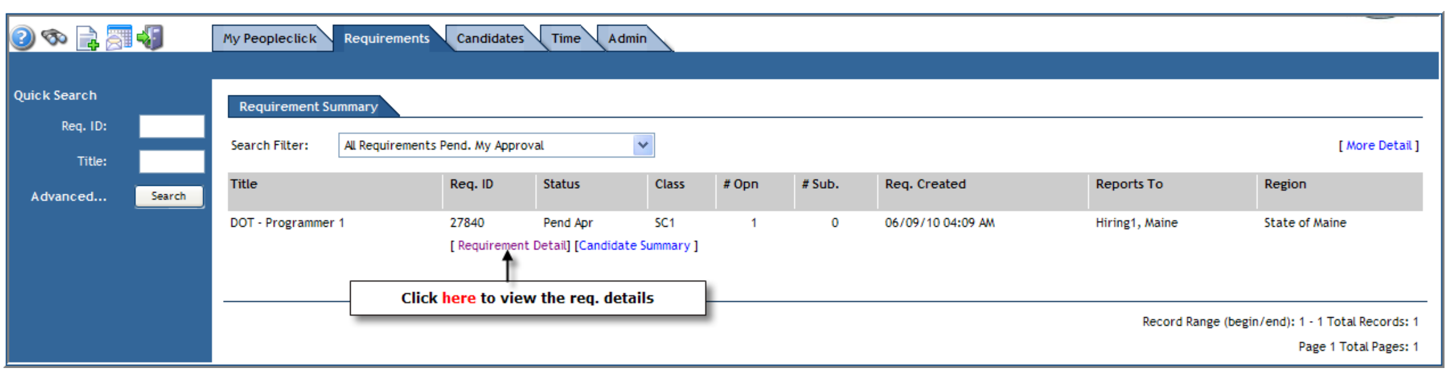


APPROVING A REQUIREMENT

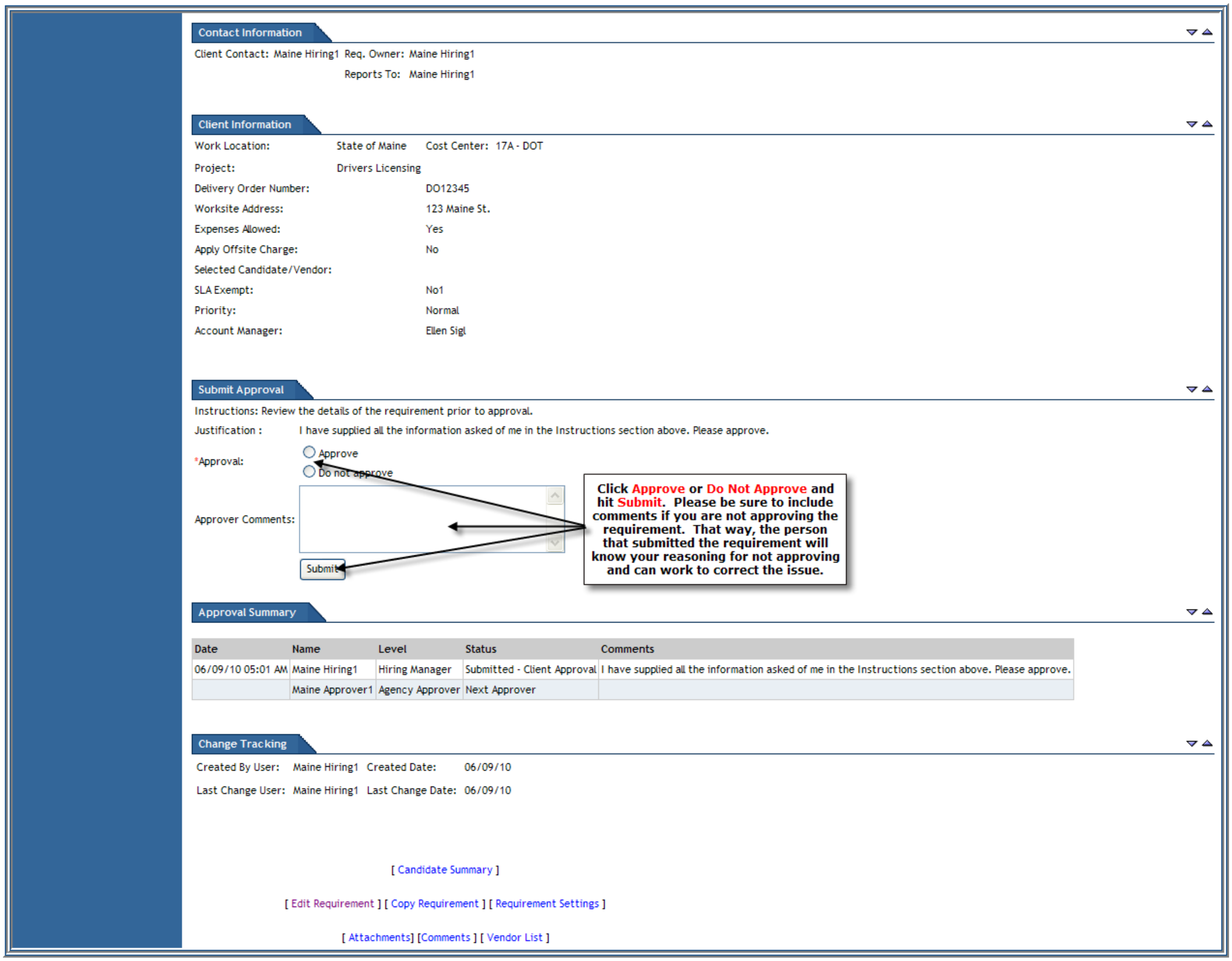
At a minimum, all requirements will be reviewed and approved by the designated CAI Account Manager who will do a final review of the requirement to ensure it is clear and complete before sending it to the vendor network.

If you are designated as an approver, you will receive an email notification from Peopleclick informing you a requirement has been sent to you for approval. Within the email, you can click on the link that will take you directly to the requirement that requires your approval. You can also access the requirement by navigating through the web-based work request tool in the following manner.





Once you have reviewed the information, scroll to the **Approval** section, as illustrated below.



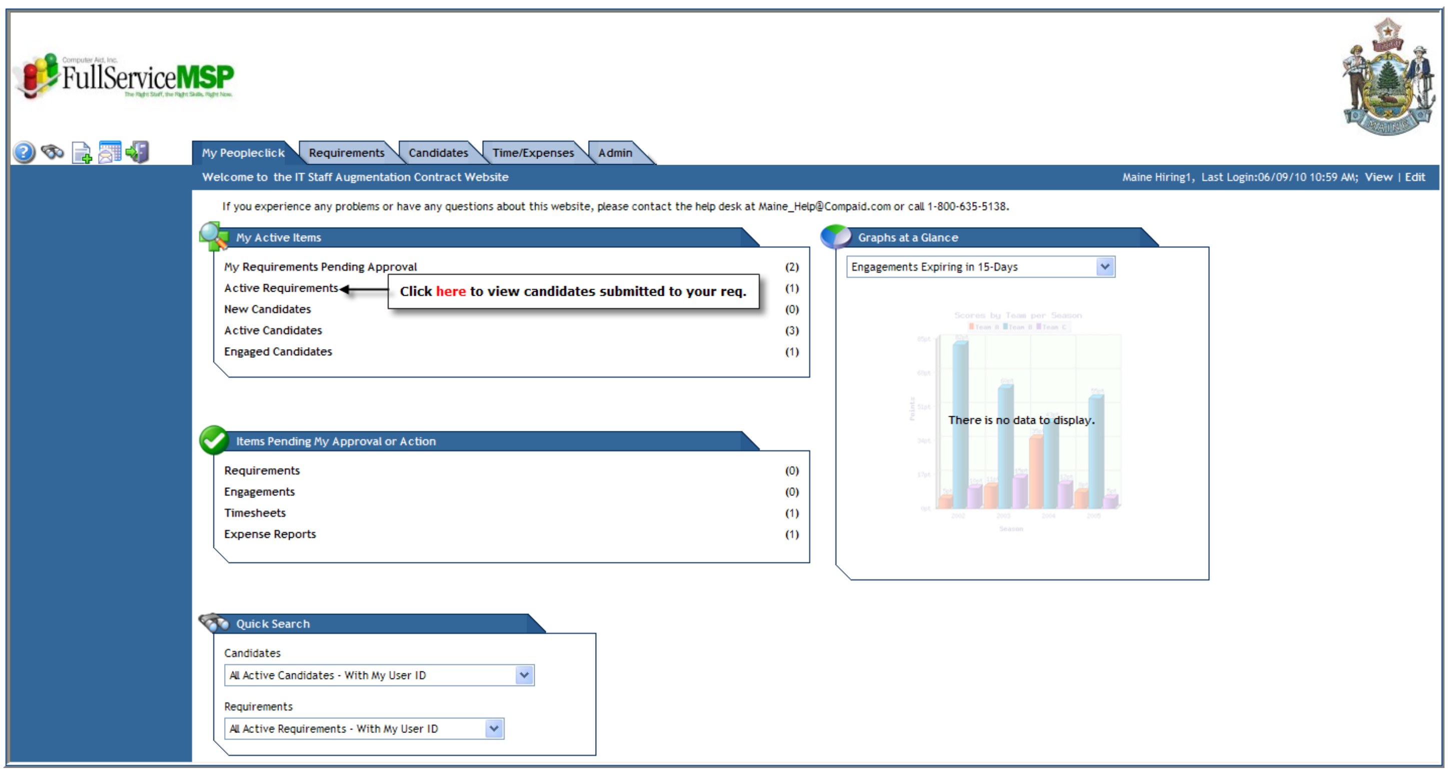
If the Requirement is rejected at any point in the approval chain, the Hiring Manager will be sent an email indicating the rejection at which point the Hiring Manager may make corrections to the requirement and resubmit for approvals.

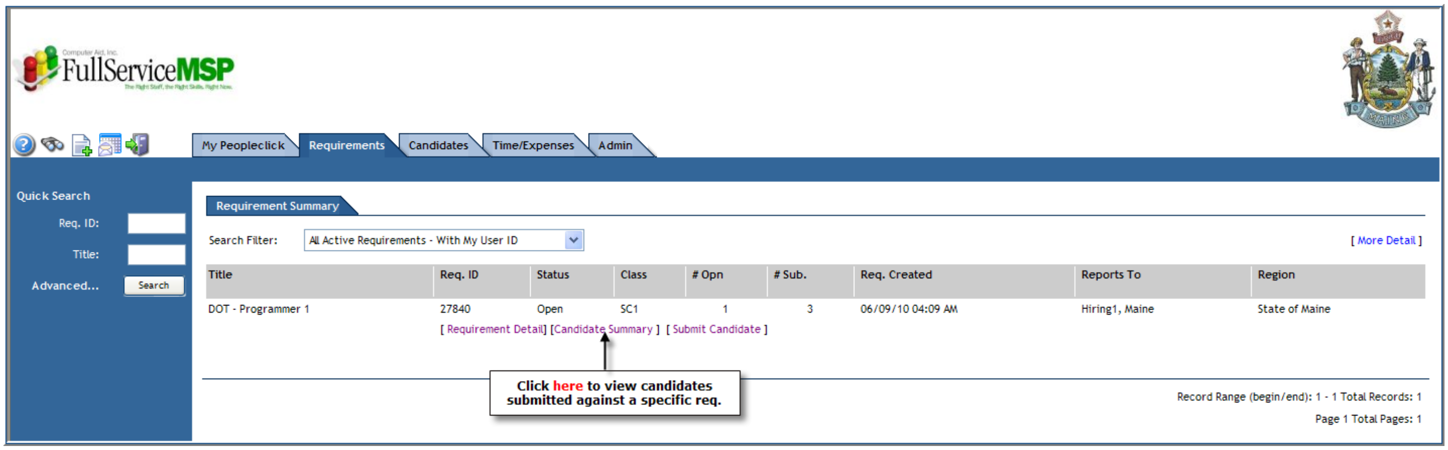
If the Requirement is approved, it will go onto the next approver in the approval chain. The process will continue until the final review is completed by the CAI Account Manager. At that point, the Requirement will be sent to the vendor network for candidate submission.

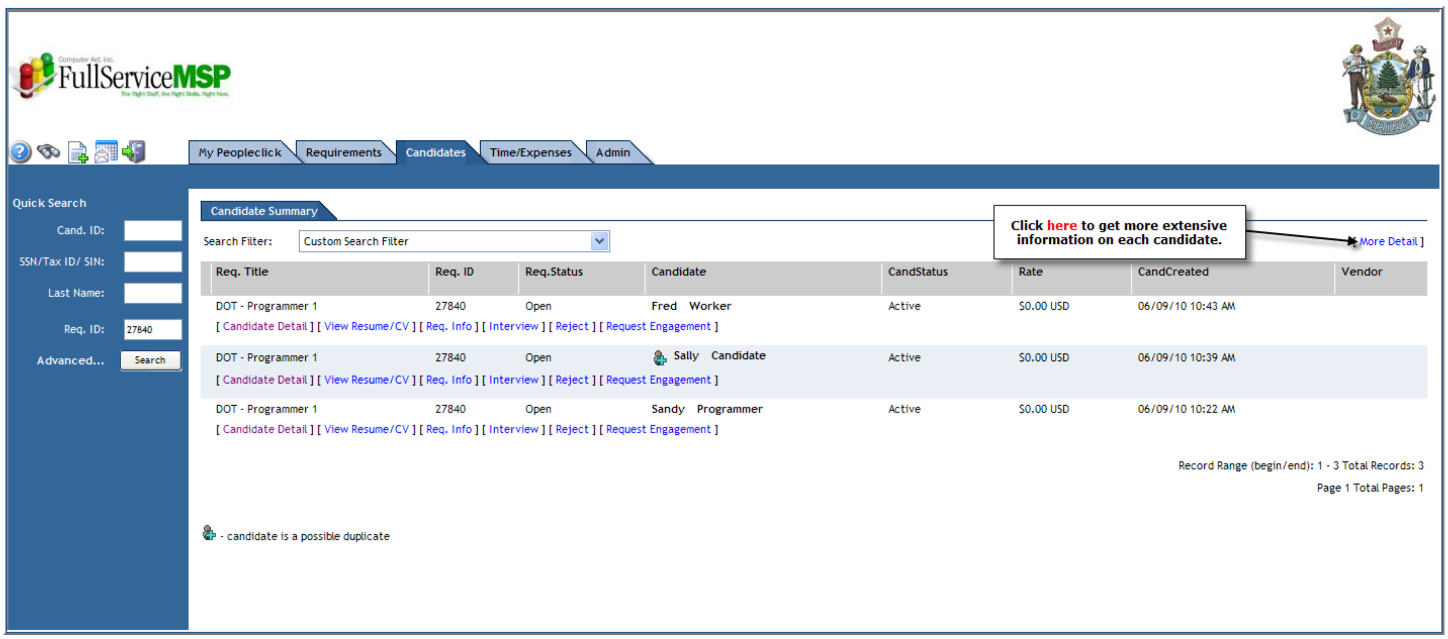
CANDIDATE SELECTION PROCESS

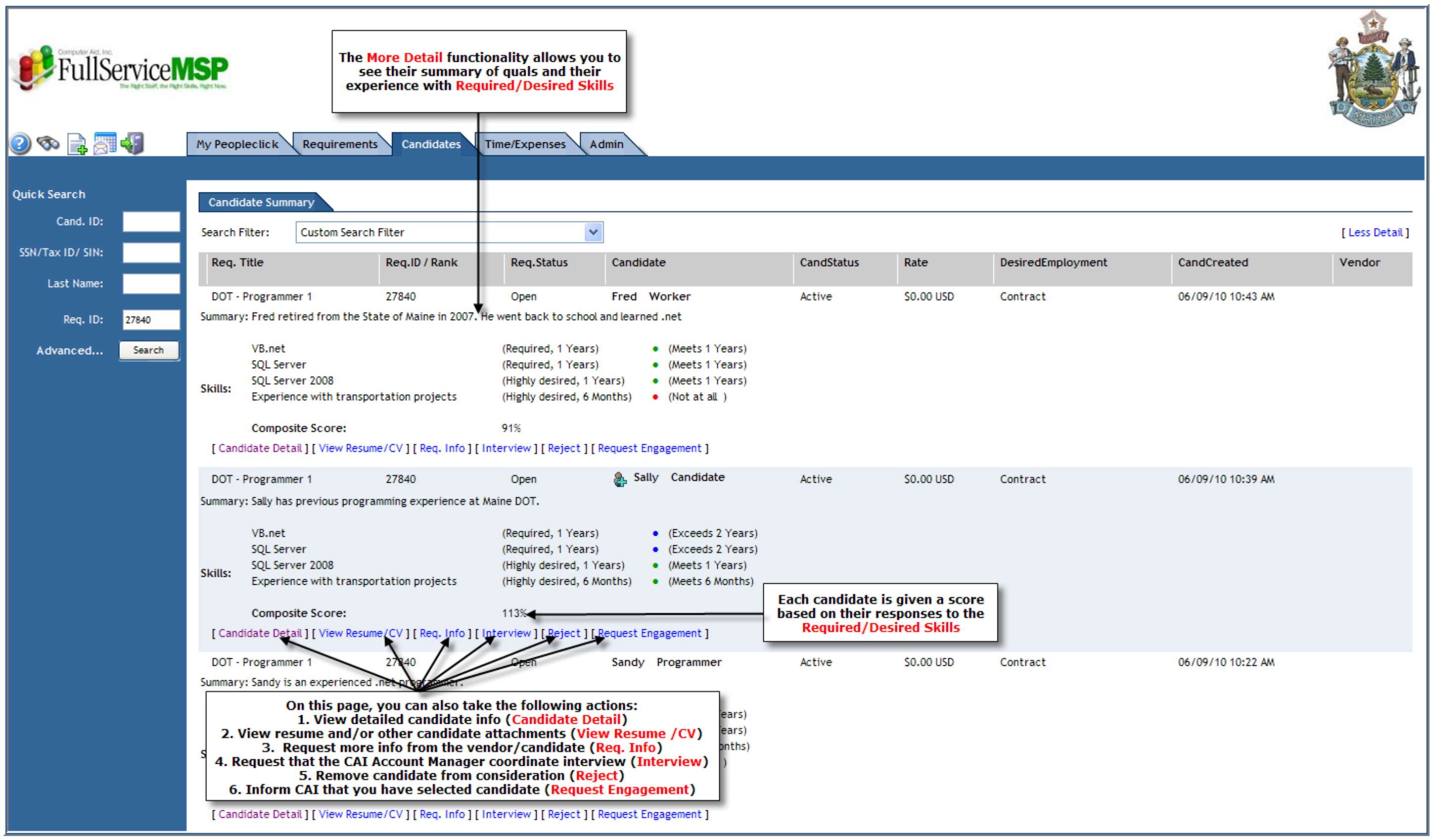
The CAI Account Manager is responsible for screening the vendor network's candidates that are submitted against your requirement. The CAI Account Manger will examine the information provided for each candidate and review the score that has been calculated by the candidate responses in the **Required/Desired** section of Peopleclick. In addition, the CAI Account Manager will compare the responses against the resume. If the CAI Account Manager feels the candidate has the necessary skills, a screening call will be done. During this call, the CAI Account Manager will validate the candidate's qualifications. If, after speaking to the candidate, the CAI Account Manager feels the candidate is a potential match for the position, the candidate will be forwarded to the Hiring Manager for consideration via the web-based work request tool.

When the candidate is forwarded, the Hiring Manager will receive an automatic email notification from Peopleclick. Within the email, you can click on a link that will take you directly to the candidate's detail page. You can also access all candidates forwarded against your requirement by navigating through Peopleclick in the following manner.




FullServiceMSP
My Peopleclick
Requirements
Candidates
Time/Expenses
Admin
Quick Search
Req. ID:
Title:
Advanced...
Search
Requirement Summary
Search Filter:
All Active Requirements - With My User ID
[More Detail]
Title | Req. ID | Status | Class | # Opn | # Sub. | Req. Created | Reports To | Region
DOT - Programmer 1 | 27840 | Open | SC1 | 1 | 3 | 06/09/10 04:09 AM | Hiring1, Maine | State of Maine
[Requirement Detail] [Candidate Summary] [Submit Candidate]
Click here to view candidates submitted against a specific req.
Record Range (begin/end): 1 - 1 Total Records: 1
Page 1 Total Pages: 1


FullServiceMSP
My Peopleclick
Requirements
Candidates
Time/Expenses
Admin
Quick Search
Cand. ID:
SSN/Tax ID/ SIN:
Last Name:
Req. ID:
27840
Advanced...
Search
Candidate Summary
Search Filter:
Custom Search Filter
Click here to get more extensive information on each candidate.
[More Detail]
Req. Title | Req. ID | Req.Status | Candidate | CandStatus | Rate | CandCreated | Vendor
DOT - Programmer 1 | 27840 | Open | Fred Worker | Active | $0.00 USD | 06/09/10 10:43 AM
[Candidate Detail] [View Resume/CV] [Req. Info] [Interview] [Reject] [Request Engagement]
DOT - Programmer 1 | 27840 | Open | Sally Candidate | Active | $0.00 USD | 06/09/10 10:39 AM
[Candidate Detail] [View Resume/CV] [Req. Info] [Interview] [Reject] [Request Engagement]
DOT - Programmer 1 | 27840 | Open | Sandy Programmer | Active | $0.00 USD | 06/09/10 10:22 AM
[Candidate Detail] [View Resume/CV] [Req. Info] [Interview] [Reject] [Request Engagement]
Record Range (begin/end): 1 - 3 Total Records: 3
Page 1 Total Pages: 1
- candidate is a possible duplicate

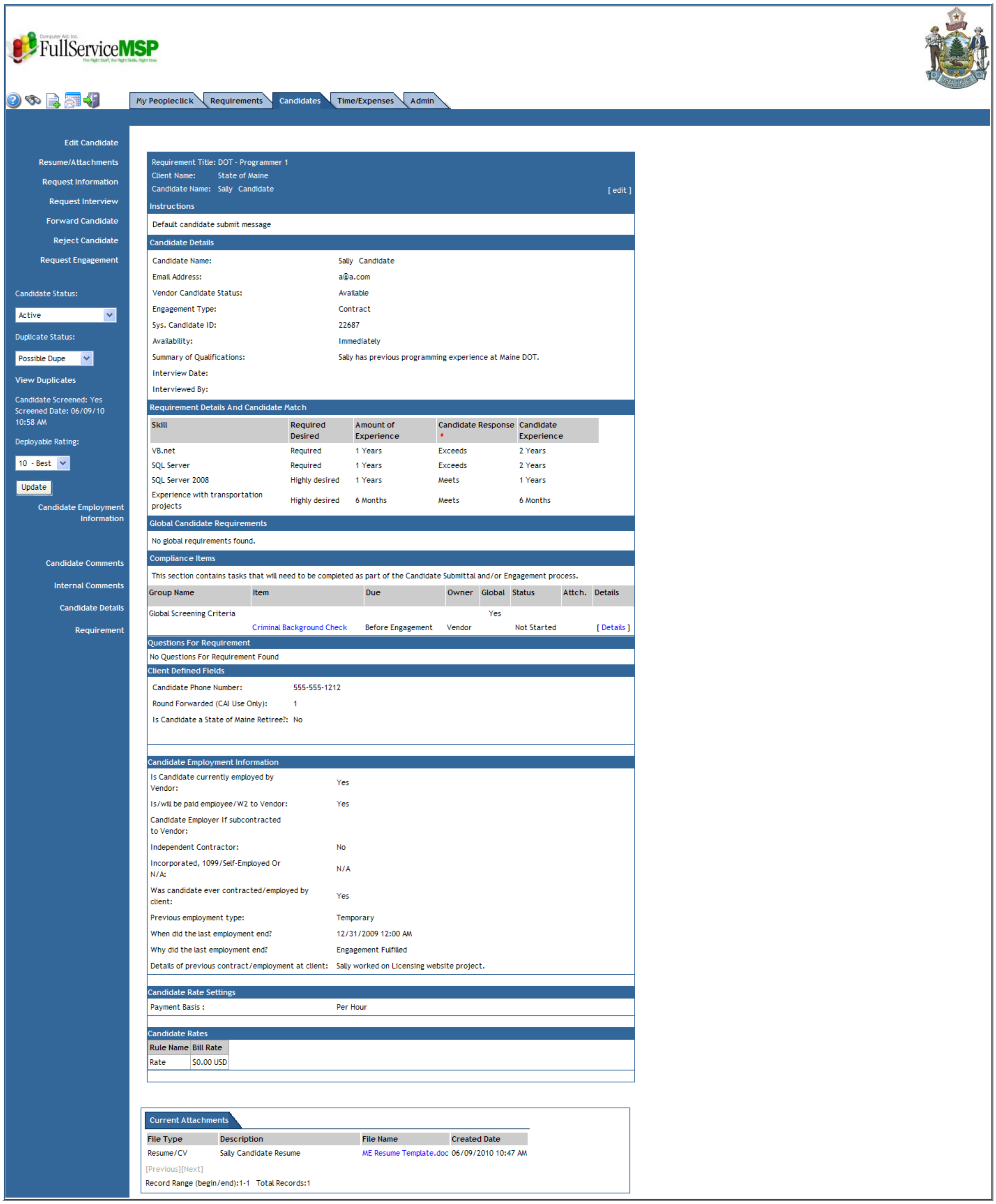


Review Candidate Detail Screen

The Hiring Manager can see detailed information on a candidate, including the following:

- Availability
- Summary of qualifications
- Skills
- Previous work experience
- Resume and other attachments

The following page is an example of the **Candidate Detail** page.



FullServiceMSP
My Peopleclick
Requirements
Candidates
Time/Expenses
Admin
Edit Candidate
Resume/Attachments
Request Information
Request Interview
Forward Candidate
Reject Candidate
Request Engagement
Candidate Status:
Active
Duplicate Status:
Possible Dupe
View Duplicates
Candidate Screened: Yes
Screened Date: 06/09/10 10:58 AM
Deployable Rating:
10 - Best
Update
Candidate Employment Information
Candidate Comments
Internal Comments
Candidate Details
Requirement
Requirement Title: DOT - Programmer 1
Client Name: State of Maine
Candidate Name: Sally Candidate
[edit]
Instructions
Default candidate submit message
Candidate Details
Candidate Name: Sally Candidate
Email Address: a@a.com
Vendor Candidate Status: Available
Engagement Type: Contract
Sys. Candidate ID: 22687
Availability: Immediately
Summary of Qualifications: Sally has previous programming experience at Maine DOT.
Interview Date:
Interviewed By:
Requirement Details And Candidate Match
Skill | Required Desired | Amount of Experience | Candidate Response * | Candidate Experience
VB.net | Required | 1 Years | Exceeds | 2 Years
SQL Server | Required | 1 Years | Exceeds | 2 Years
SQL Server 2008 | Highly desired | 1 Years | Meets | 1 Years
Experience with transportation projects | Highly desired | 6 Months | Meets | 6 Months
Global Candidate Requirements
No global requirements found.
Compliance Items
This section contains tasks that will need to be completed as part of the Candidate Submittal and/or Engagement process.
Group Name | Item | Due | Owner | Global | Status | Attch. | Details
Global Screening Criteria | | | | Yes
Criminal Background Check | Before Engagement | Vendor | Not Started | [Details]
Questions For Requirement
No Questions For Requirement Found
Client Defined Fields
Candidate Phone Number: 555-555-1212
Round Forwarded (CAI Use Only): 1
Is Candidate a State of Maine Retiree?: No
Candidate Employment Information
Is Candidate currently employed by Vendor: Yes
Is/will be paid employee/W2 to Vendor: Yes
Candidate Employer If subcontracted to Vendor:
Independent Contractor: No
Incorporated, 1099/Self-Employed Or N/A: N/A
Was candidate ever contracted/employed by client: Yes
Previous employment type: Temporary
When did the last employment end? 12/31/2009 12:00 AM
Why did the last employment end? Engagement Fulfilled
Details of previous contract/employment at client: Sally worked on Licensing website project.
Candidate Rate Settings
Payment Basis : Per Hour
Candidate Rates
Rule Name | Bill Rate
Rate | $0.00 USD
Current Attachments
File Type | Description | File Name | Created Date
Resume/CV | Sally Candidate Resume | ME Resume Template.doc | 06/09/2010 10:47 AM
[Previous][Next]
Record Range (begin/end):1-1 Total Records:1

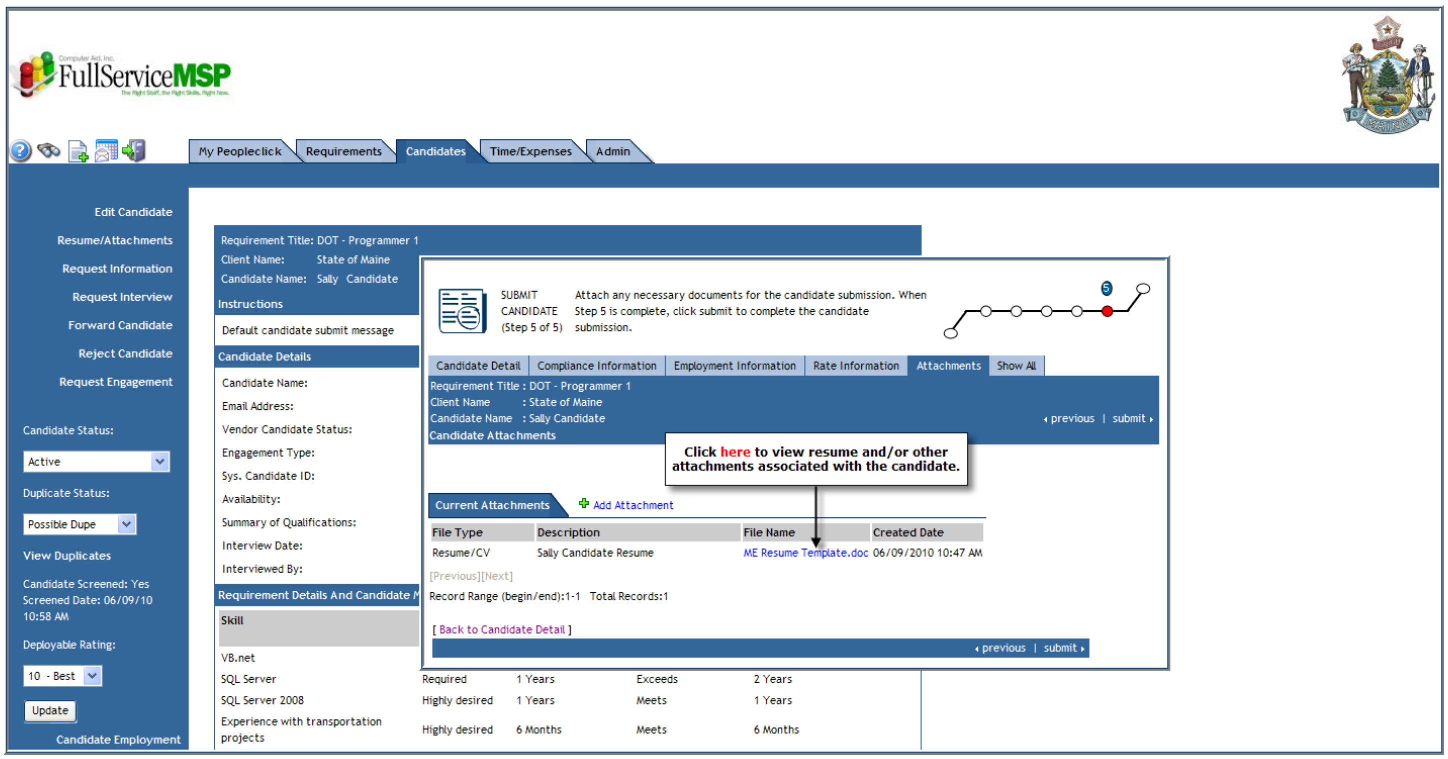
From the **Candidate Detail** page, the Hiring Manager can do the following:

- View a candidate's resume and/or additional documents attached to the submittal
- Request additional information about the candidate
- Request an interview with the candidate
- Reject the candidate
- Request that the candidate be engaged

The following pages describe these actions in greater detail.

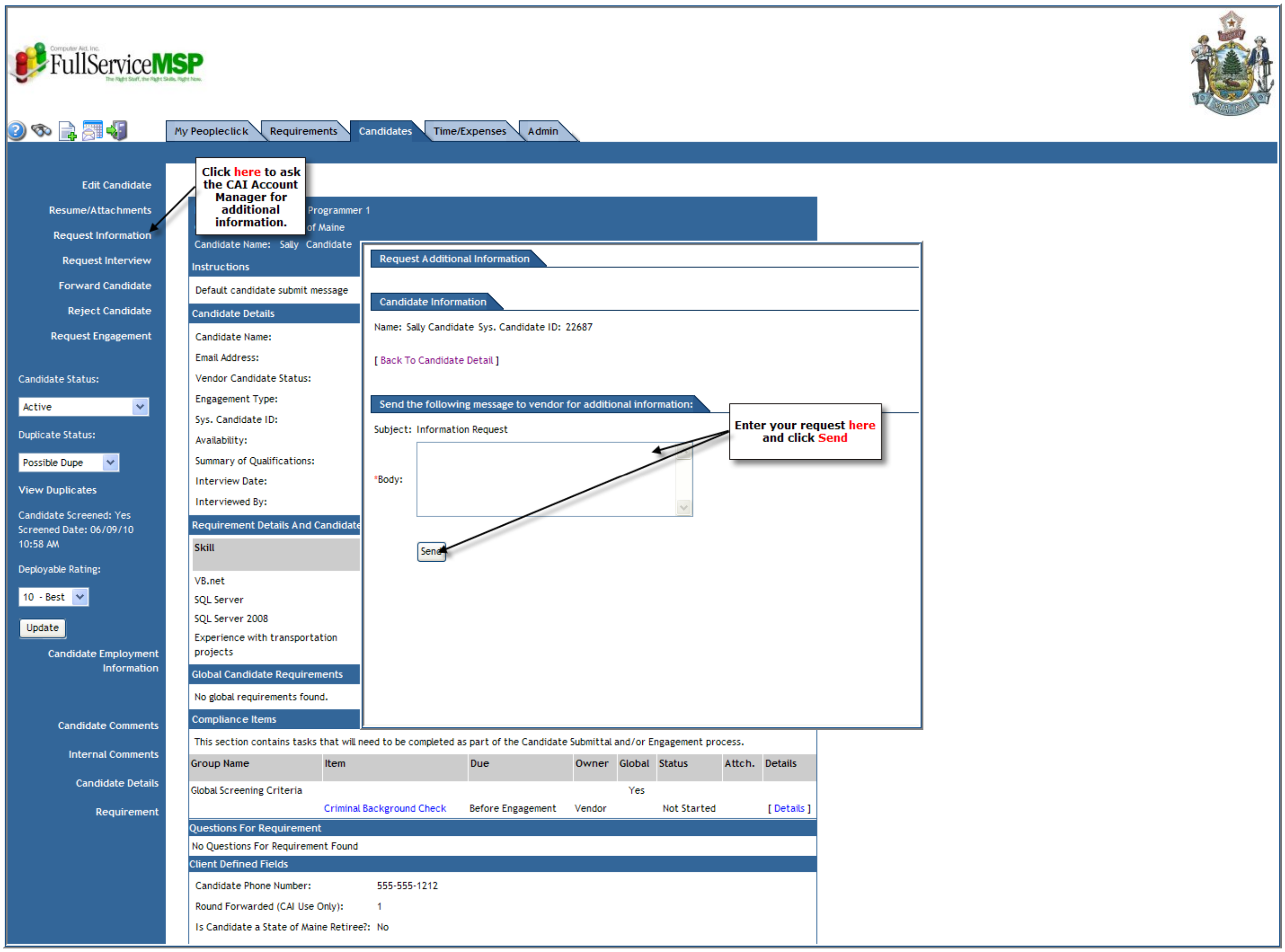
View Resume/Attachments

The **Resumes/Attachments** option enables you to view the resume of the candidate as well as any other attachments associated with the candidate.



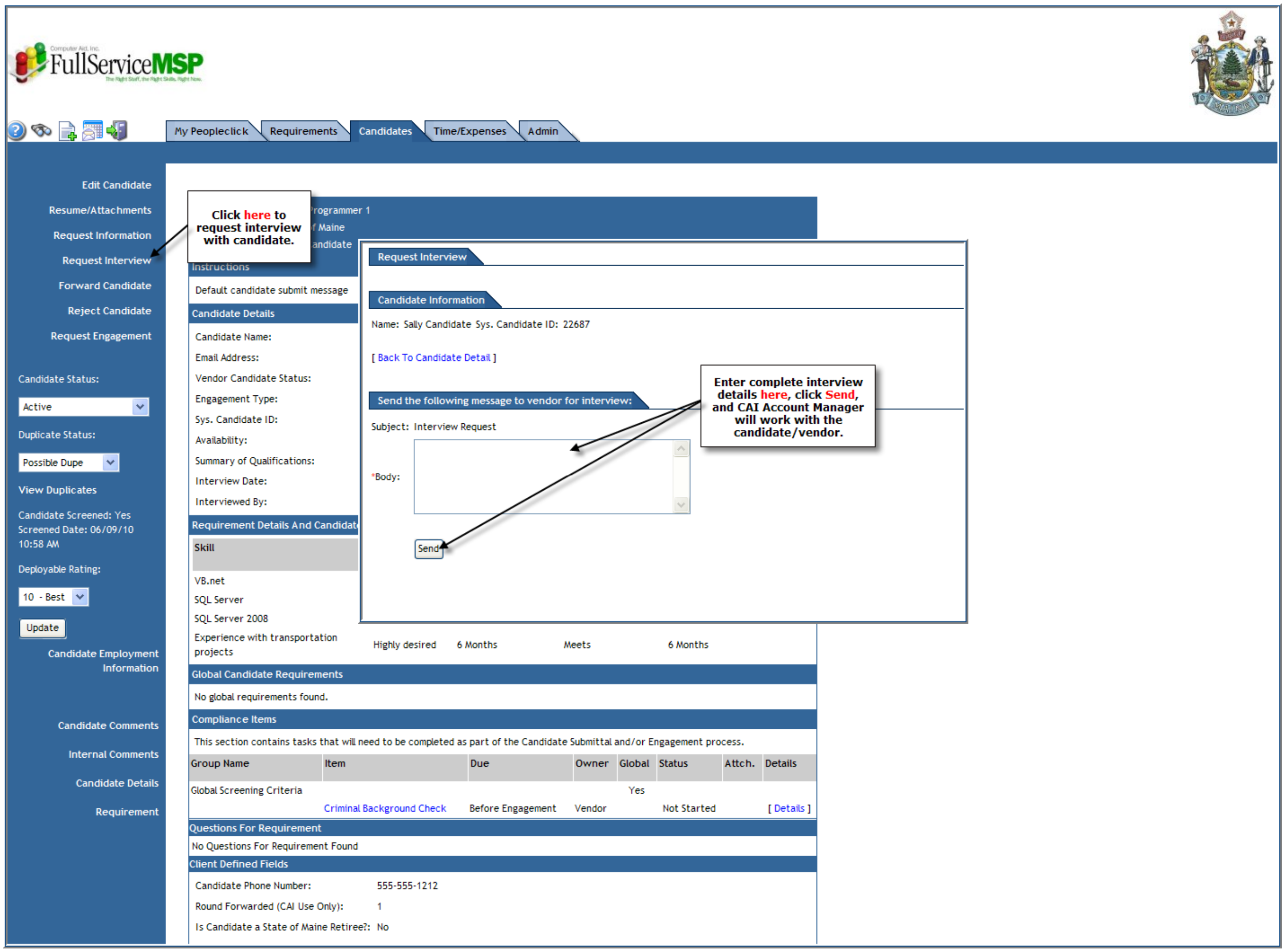
Request Information

The **Request Information** option enables you to request additional information about the candidate. You just need to note the additional information needed in Peopleclick, and the CAI Account Manager will work directly with the candidate/vendor to get this information.



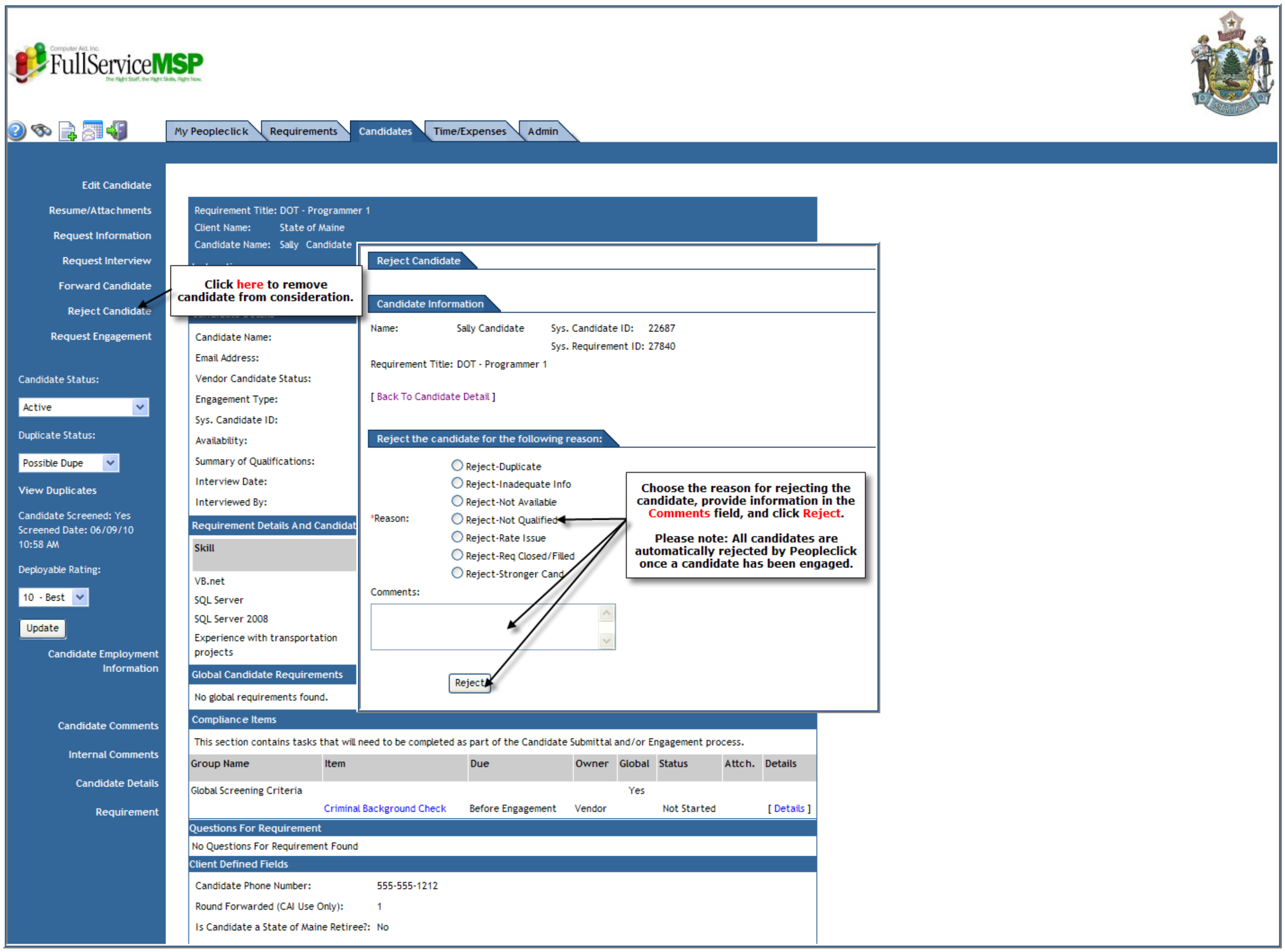
Request Interview

The **Request Interview** option should be used to request an interview. Once again, you note the complete interview details in Peopleclick (e.g. over the phone or in person), and the CAI Account Manager will coordinate the scheduling of the interview with the candidate/vendor.



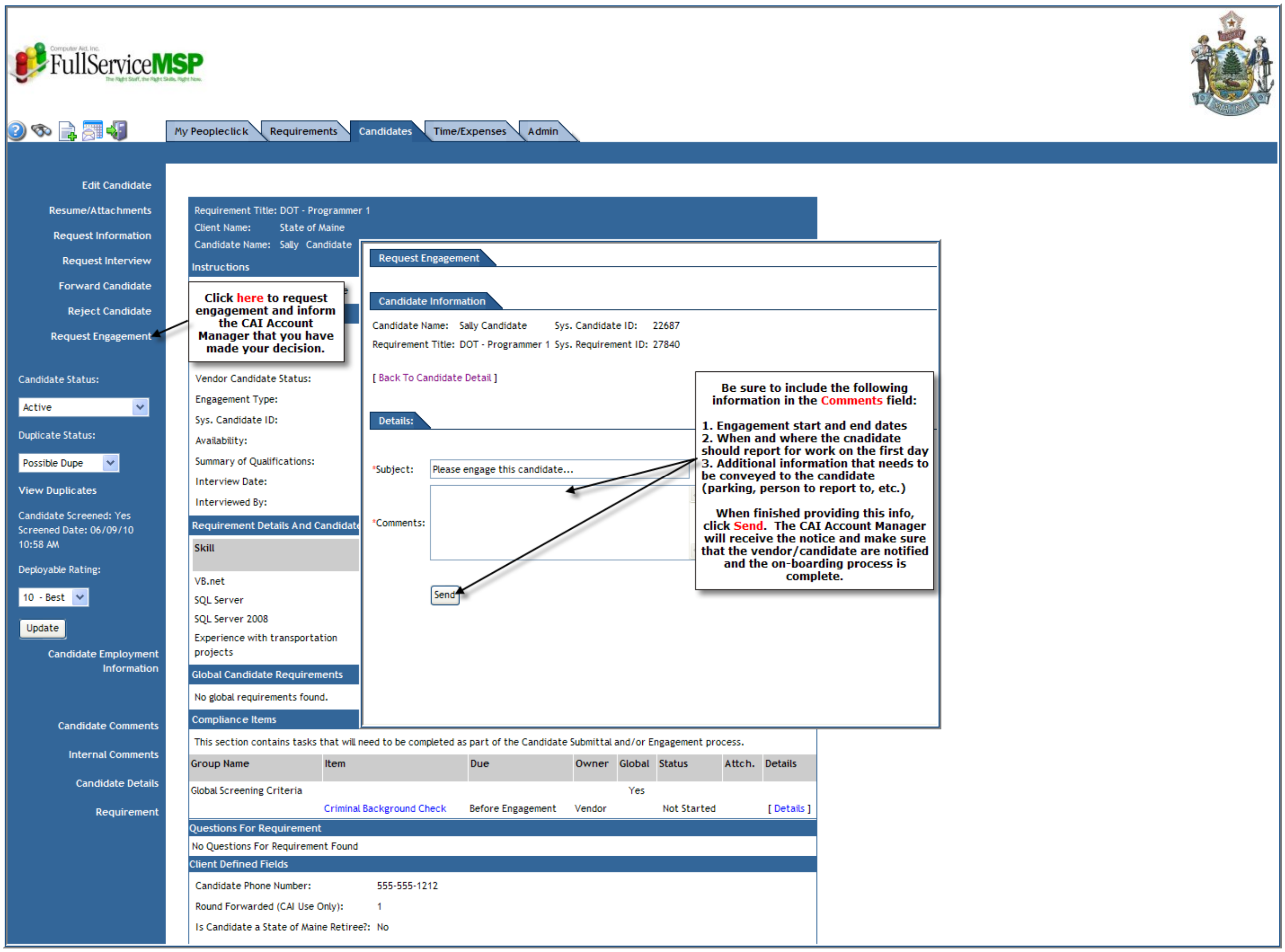
Reject Candidate

The **Reject Candidate** option enables you to remove a candidate from consideration.



Request Engagement

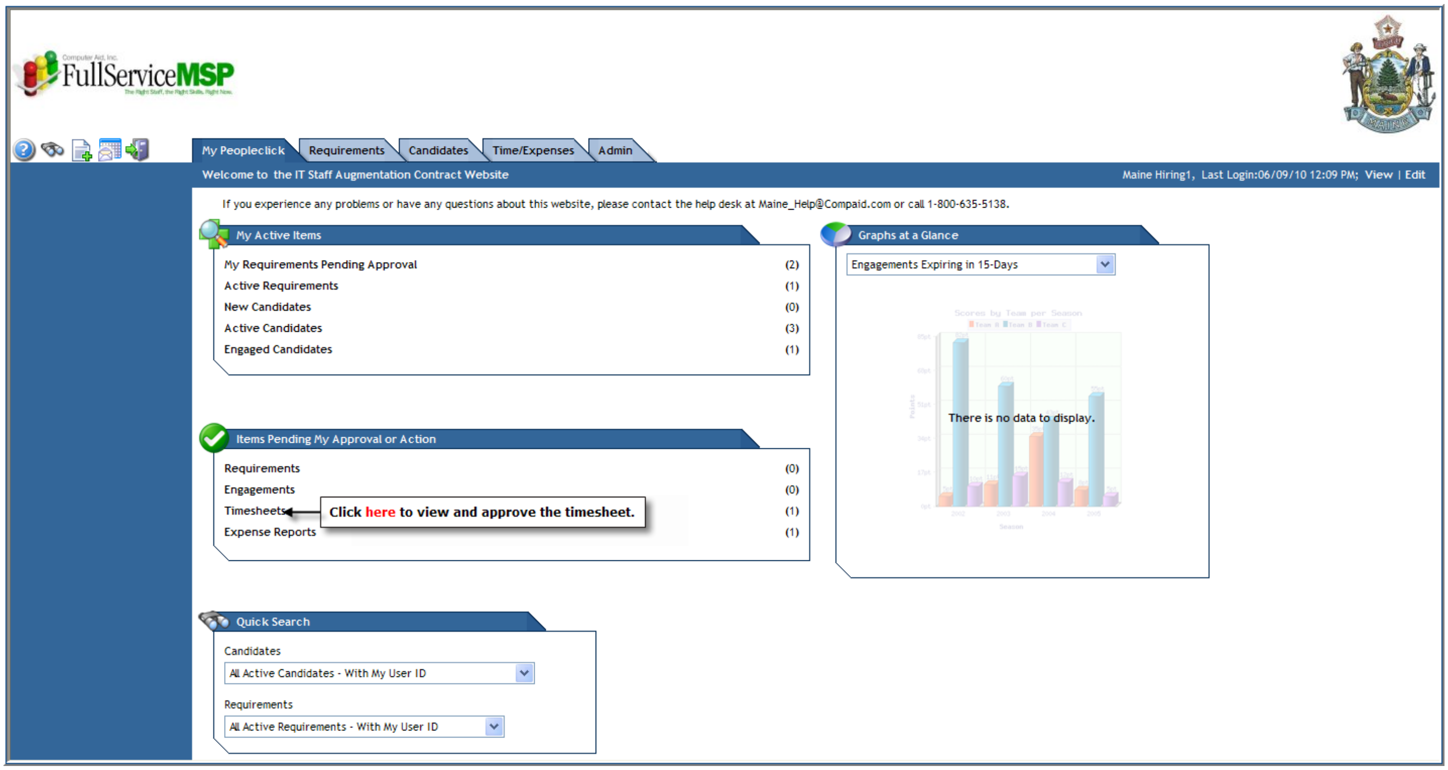
When you have selected a candidate, please use this option to request the engagement. When the CAI Account Manager receives the notification, we will begin the engagement process.

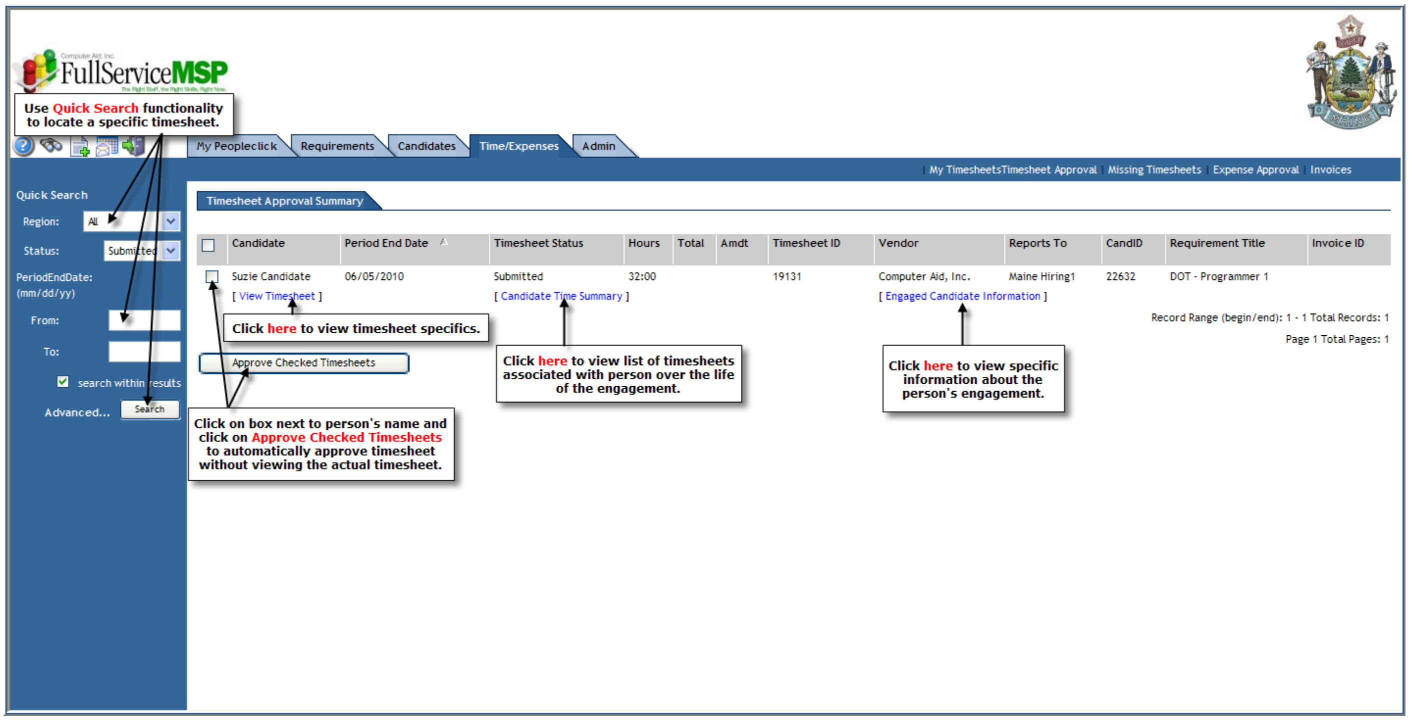


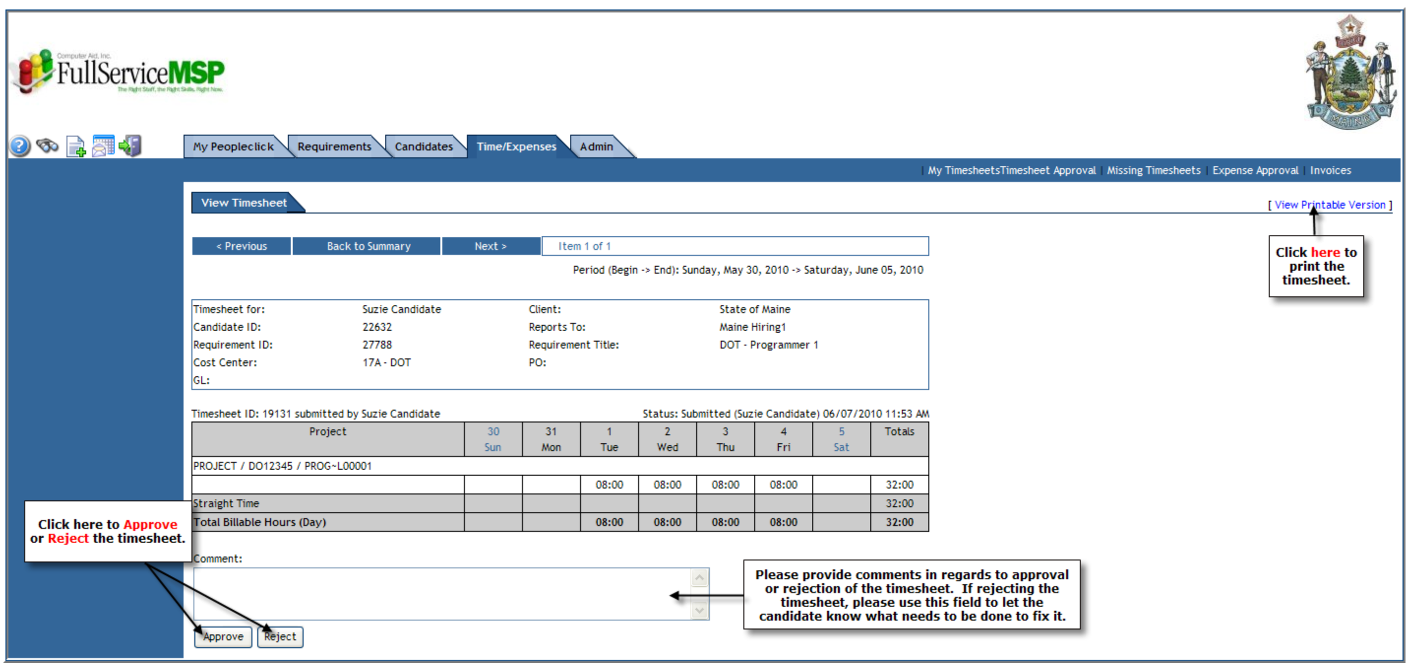
TIMESHEET APPROVAL

Each engaged candidate will be required to enter a weekly timesheet by noon on Monday into Peopleclick. The Hiring Manager or other designated timesheet approver will be required to approve these timesheets by the close of business on Tuesday of each week. This approval indicates the hiring manager has accepted the time entered as being valid and approved for invoicing.

If you are designated as timesheet approver, you will receive email notification from Peopleclick. Within the email, you can click on a link that will take you directly to the timesheet that is pending your approval. You can also access all timesheets pending your approval by navigating through Peopleclick in the following manner.







If a timesheet is rejected, the candidate has the opportunity to correct and resubmit for approval. This process will continue until the timesheet is approved.

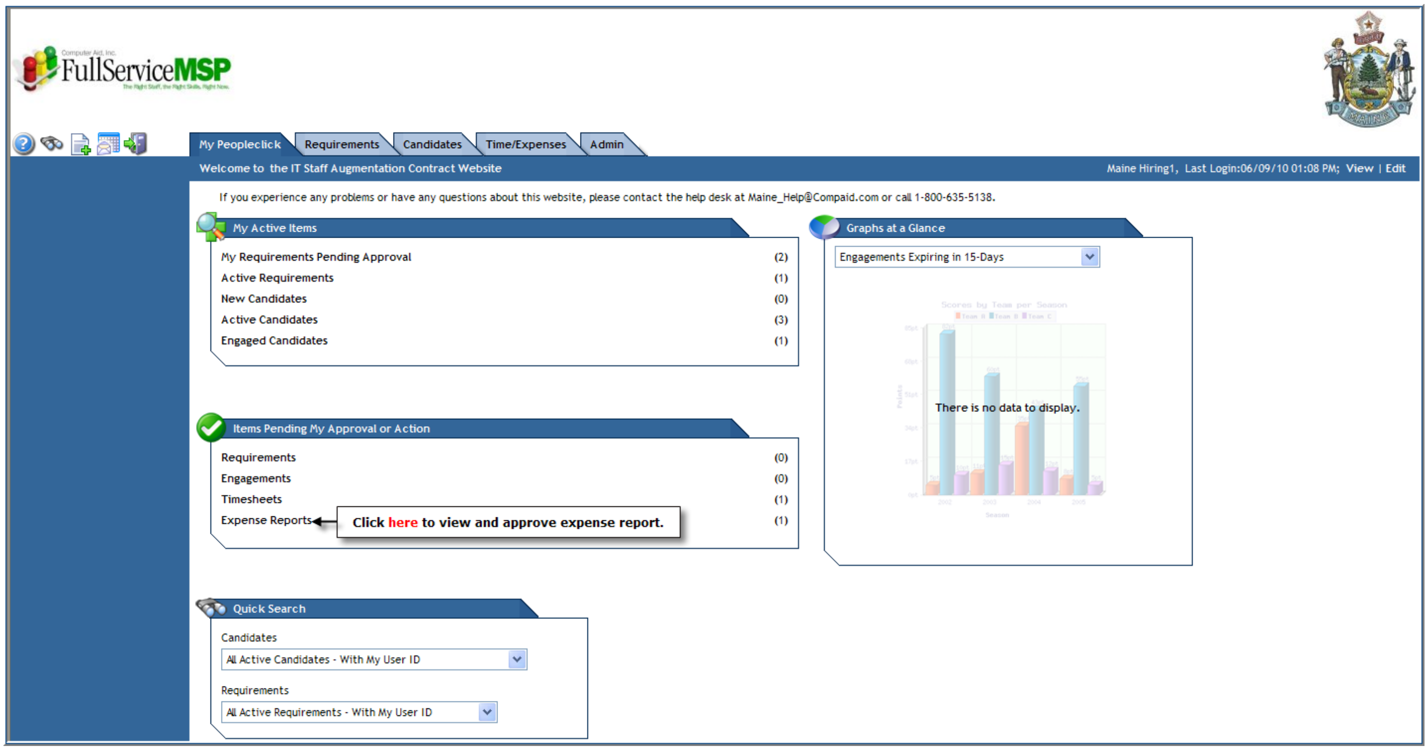
If it is determined that a timesheet was submitted in error after it was approved, an amendment can be done to the timesheet. However, only the CAI Administrator can create an amendment. The amendment will require approval by the hiring manager in the same manner as regular timesheet approval.

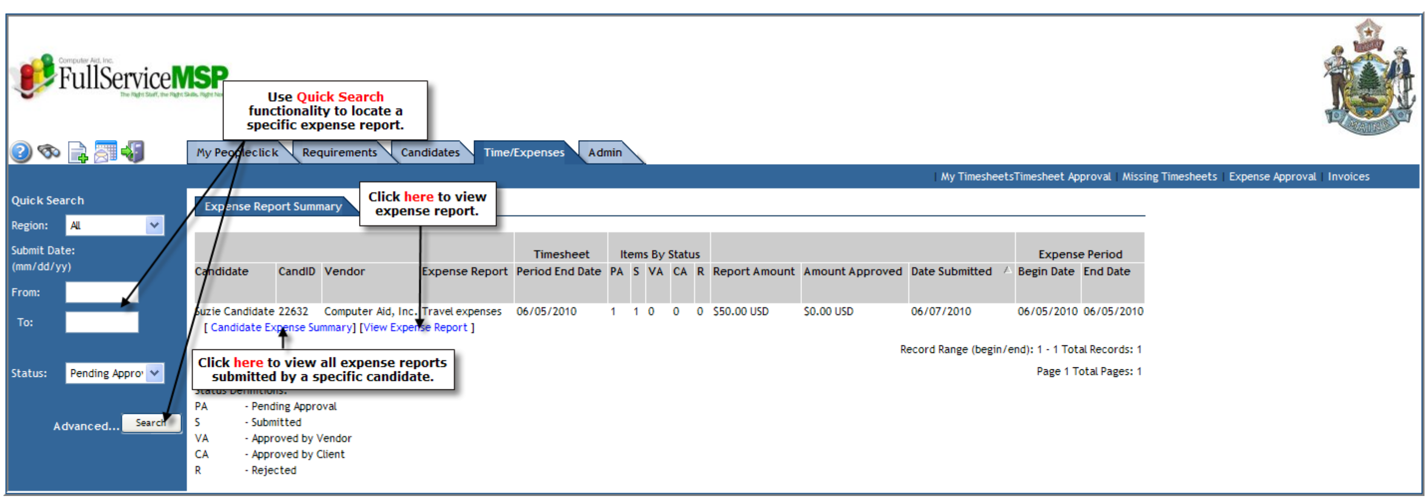
EXPENSE APPROVAL

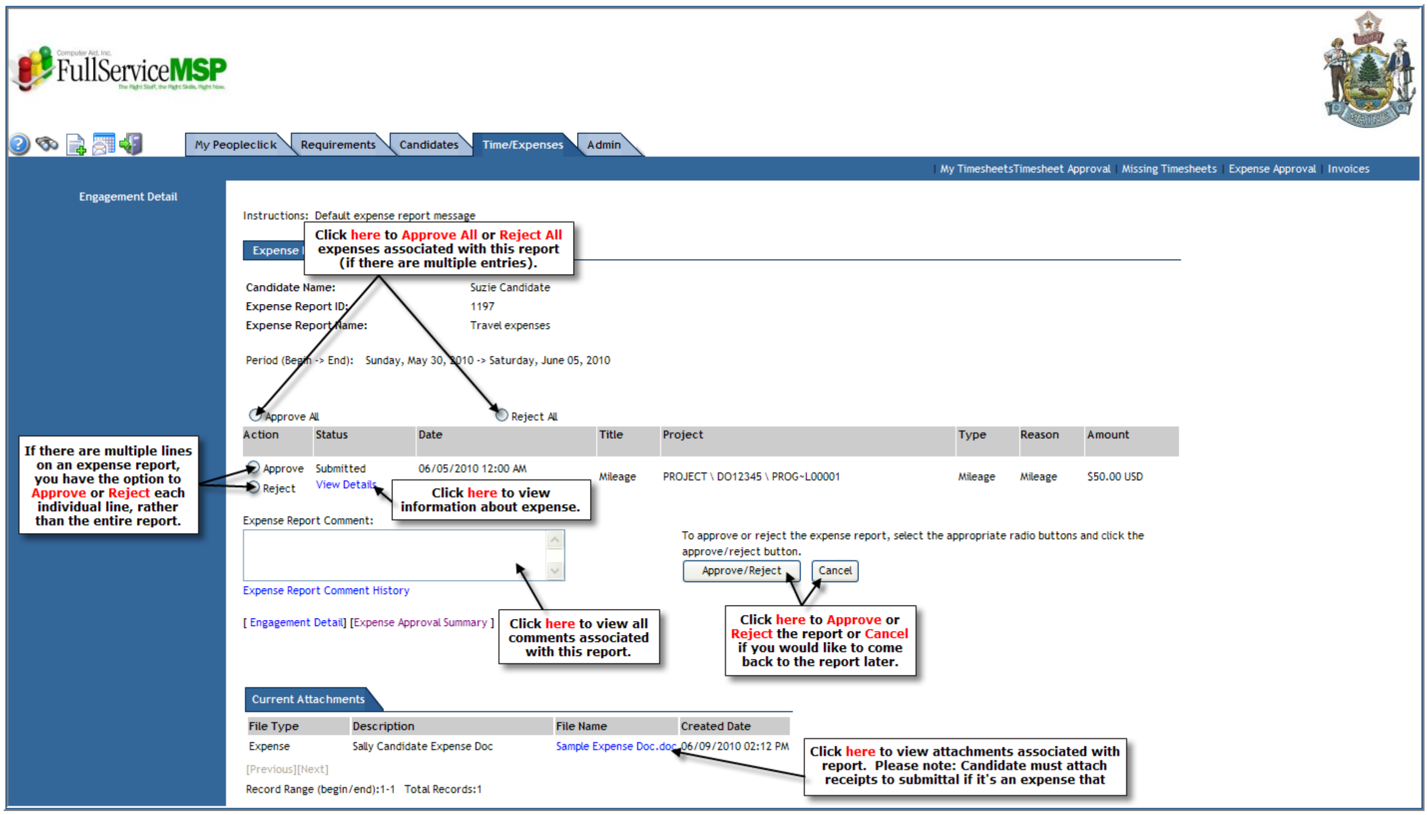
Like the timesheets, any engagement-related expenses that the State has agreed to reimburse must be approved by the Hiring Manager through Peopleclick.

If you are designated as an expense approver, you will receive email notification from Peopleclick when an expense has been sent to you for approval. Within the email, you may click a link that will take you directly to the expense report that is pending your approval.

You may also access all expense reports that require your approval by navigating through Peopleclick in the following manner.







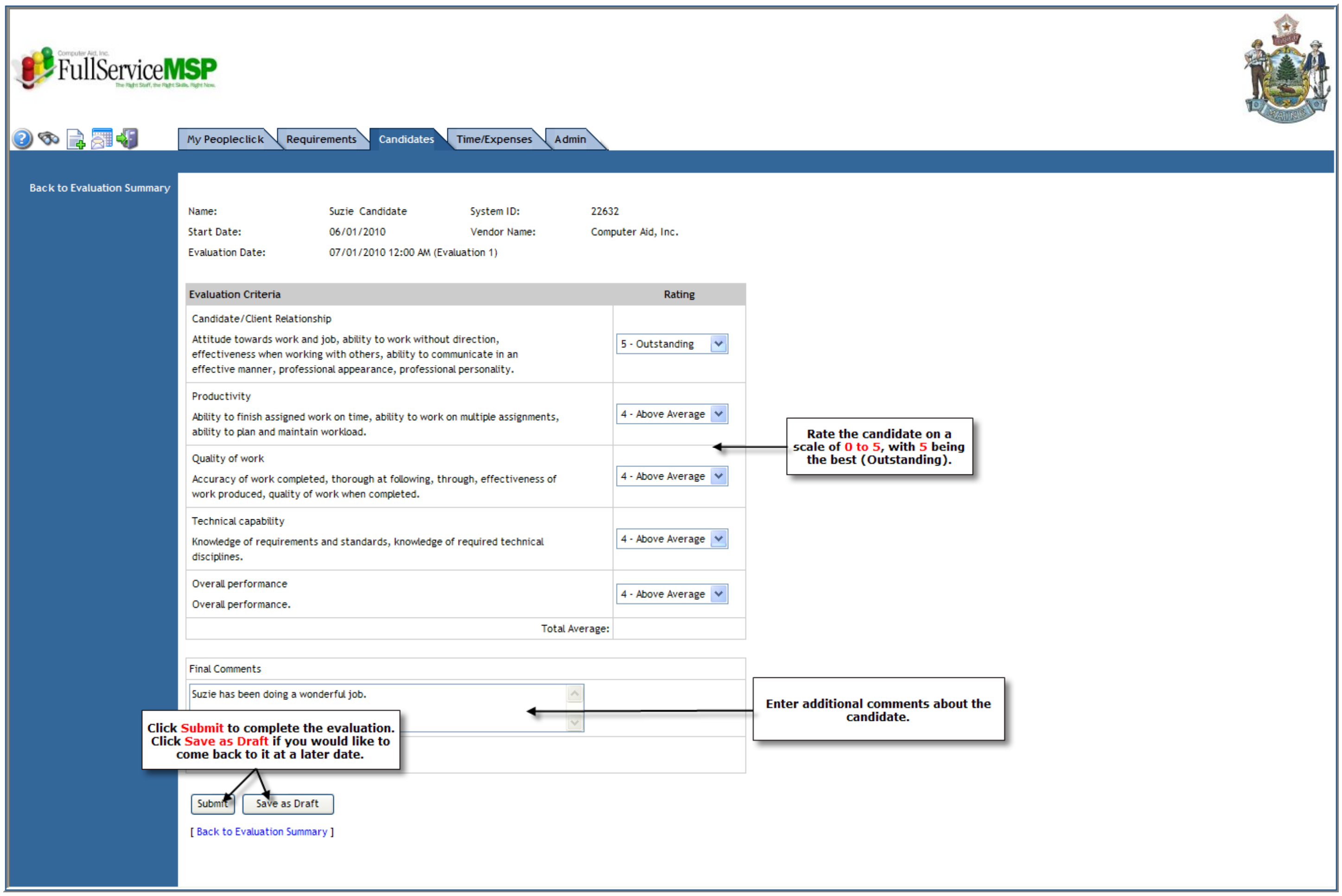
Expenses should only be approved if they have provided complete information, and have attached receipts for all expenses requiring such documentation. If you are not sure which expenses should include receipts, please feel free to contact your CAI Account Manager.

If you reject the expense report, the candidate will need to resubmit. If you discover an error on the expense report after you have already approved it, please contact the CAI Account Manager or the CAI-managed help desk. The CAI team will ensure that it is corrected.

ENGAGEMENT EVALUATIONS

For each engaged candidate, the Hiring Manager will receive an email request to complete an engagement evaluation form. Evaluation requests will be made after first 30 days, 6 months, and 1 year. The evaluations are not required but highly recommended as they will be available for future reference.

To complete the evaluation, simply click on the link within the evaluation email notification that is sent to you via Peopleclick.



GETTING HELP

You are now ready to begin using Peopleclick to fill all your IT Staff Augmentation requirements. Should you need assistance, please contact CAI's IT Staff Augmentation Help Desk at Maine_Help@compaid.com or 1-800-635-5138.